

“

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Matthew Patten, CEO of Cutler Investment Group



For three generations, Cutler Investment Group has managed wealth for public and private clients, including individual investors, retirement plans, corporations, and institutions. Matthew Patten, CEO of Cutler Investment Group, and his team believe that their fiduciary duty means always putting their clients' interests first. Entrusted with a growing portfolio of assets for groups and individuals, Cutler serves clients in all 50 states and has expanded in a little over ten years from its headquarters in Jacksonville, Oregon, to include offices in Anchorage, Alaska; Bellevue, Washington; and Newport Beach, California.

Growth begets complex technological demands, cybersecurity risks, and the need for a scalable IT strategy. With their longtime internal IT leader approaching retirement while their company was growing, systems were stretching uncomfortably, and the organization faced a pressing question: **Should we staff up? Or find the right partner to elevate our IT operations and prepare for the future?**

Cutler's internal IT team was inundated with multioffice demands, increased headcount, and rising cybersecurity concerns. They needed:

- A managed services partner to stabilize operations
- Stronger cybersecurity posture and bestpractice implementation
- Support through eventual internal IT transition
- Scalable systems for a growing, multistate firm
- A collaborator who could help them navigate, and leverage, the accelerating impact of AI

They did not make the decision haphazardly. Cutler conducted a nationwide search across numerous providers, including national MSPs, offshore models, and a finance-specific IT firm. The verdict?

“It was clear pretty quickly,” Matt recalls. “Kelley Create had the best balance of partnership, cost, industry understanding, and the ability to work with real humans who don't always click on the buttons they are supposed to. They understood us.”

Since officially partnering in early 2025, Kelley Create has become an extension of Cutler's team, bringing stability, clarity, and forward momentum. Cutler has seen:

- Significantly reduced downtime, translating into real productivity gains
- A stronger cybersecurity foundation, evolving monthly through joint roadmap sessions
- Eighteen months of strategic IT planning, creating confidence and budget predictability
- A true collaboration around AI, where both teams challenge, learn from, and push each other

Kelley Create isn't just fixing keyboards or troubleshooting WiFi: "They're not just solving problems," Matt says. "They're helping us rethink how we operate as a business."

Cutler values culture and people above all else. And they saw the same in Kelley Create. They gained not just technical expertise, but a partner who listens, thinks strategically, and evolves alongside them.

As Cutler continues scaling, Kelley Create provides the infrastructure, innovation, and support that ensure technology becomes a catalyst, not a constraint.

A growing firm. A modern IT foundation. A partnership built on trust and shared ambition.

Have a challenge for your organization we can help tackle? We'd love to set up a consultation to see how we can help find a solution that helps grow your business.



www.kelleycreate.com