New RightSize Shield & Cybersecurity Policy Template Announcement

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RightSize Solutions Brings Secure, Fast and Flexible Managed Technology Environment to Independent RIAs with the New RightSize Shield

New Cybersecurity Whitepaper and Policy Template Give RIAs More Cybersecurity Resources

Lenexa, Kan. – Sept. 12, 2018 – In one complete and compliant offering, [RightSize Solutions](#) has built the next level of technology support for independent registered investment advisors (RIAs). Called the RightSize Shield™, RIAs now have a fast and flexible operating environment that complies with regulatory guidance, enables cybersecurity best practices and enforces the firm's security policies.

To call attention to the urgent need for better RIA cybersecurity, RightSize Solutions is also offering a cybersecurity policy template for RIAs with its latest whitepaper, *The Cybersecurity Policy Upgrade Imperative,* which are both available for download on the company's [website](#).

RightSize Solutions provides outsourced information technology (IT) management and cloud-based cybersecurity solutions to the wealth management industry, with a special focus on RIAs. The company is the leading provider of cloud hosting and cyber tools to RIAs, receiving some of the highest marks for customer satisfaction, according to a recent survey of independent advisors[1].

Its ground-breaking offering, the RightSize Shield, addresses the widening gap between RIAs' need for increasingly secure and sophisticated data and technology security and their lack of quality bandwidth to be able to handle these issues efficiently, cost-effectively and in compliance with regulatory guidelines. The Shield is a comprehensive and flexible operating platform that reduces cybersecurity risks in a way that optimizes a firm's technology spend.

"Putting everything 'in the cloud' is not a cybersecurity plan. A secure, private cloud is only one piece of a comprehensive cybersecurity program that can pass regulatory muster and even more importantly, withstand cyberattacks," said Wes Stillman, founder and chief executive officer of RightSize Solutions.

"RIAs need to stay ahead of potential breaches, but their reliance on web-based solutions and mobile devices means that firms, client data and assets are at increasingly greater risk of an attack."

What is the RightSize Shield?

The RightSize Shield gives RIAs the best in data protection and computing resources without

compromising cost, speed or flexibility. Using a holistic approach, the Shield includes technology management, planning, implementation and monitoring so advisors can work the way they want to work. This includes:

Importantly, the RightSize Shield addresses the cybersecurity preparedness recommendations from the Securities and Exchange Commission's Office of Compliance Inspections and Examinations (OCIE). User access rights and management protocols allow RIAs to configure user- and device-level access. Its conditional access protocols add another layer of security. And the Shield supports strong data loss prevention protocols by managing the dissemination of client data and company information within and outside of the firm's private cloud.

"Protecting against cyberattacks and data exposure is critical to every RIA's business and reputation," said Stillman. "As regulatory scrutiny increases, RIAs need a defensible program that shows they are protecting clients and data to the best of their ability. 'The cloud' and off-the-shelf infrastructure offerings alone do not empower advisors to be able to make this claim."

The Shield combines the advantages of centralized and decentralized computer network architecture – security and flexibility, respectively – in one secure, centrally managed platform. The plasticity of the Shield also makes it easy for firms to scale operations as business grows and bolster their business continuity and disaster recovery capabilities.

By using multi-pathing capabilities for all available internet service provider (ISP) lines through the use of a proprietary, highly configured SD-WAN platform, the Shield maximizes the available bandwidth speed of all ISP connectivity options. For RIAs, this means that data is transmitted faster and at a higher quality, and issues with data line capacity and redundancy are eliminated.

The Cybersecurity Policy Imperative

Cybercriminals and criminal networks are highly sophisticated operations that are increasingly successful at flying under the radar, according to the newest whitepaper from RightSize Solutions. As a first line of defense, RIAs need policies and procedures that can stand up to this level of clandestine attack.

There are several components to successful cybersecurity policy implementation for RIAs, and the need for C-level support is first and foremost. The RIA's chief information officer / chief information security officer must be someone who not only understands the potential risks to the business as a whole, but who has the authority and necessary gravitas to enforce a culture of compliance.

The paper also makes the case for closer monitoring of email usage. Whether due to user error or gaps in cybersecurity protection, most breaches happen through email. To prevent these issues, strong cybersecurity policies have conditional access rules and technology in place, such as multi-factor authentication (MFA) and email monitoring.

"Without enforceable cybersecurity policies and procedures, RIAs simply do not stand a chance against today's sophisticated criminals," said Stillman. "Implementing technology or cybersecurity measures without a strong policy is like attempting to build a house without a blueprint. The cybersecurity policy gives the advisor the plan for dealing with perceived threats."

To learn more about the RightSize Shield, click here to access the downloadable brochure.

To download *The Cybersecurity Policy Upgrade Imperative* and cybersecurity policy template, click here.

About RightSize Solutions

Founded in 2002 and based in Lenexa, Kan., RightSize Solutions helps RIAs gain a competitive advantage and do better business. The company was the very first provider of outsourced technology management and cloud-based cybersecurity solutions to RIAs, and today remains committed to helping independent advisors achieve business excellence in the safest environment. More information on RightSize Solutions is available here.

[1]*2018 Software Survey*; T3, Inside Information and Advisor Perspectives; 2018.