

RightSize Cyber-Chats: Technology Issues Facing Financial Advisors

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Welcome to RightSize Cyber-Chats, a series of candid conversations about the most pressing cybersecurity and technology issues facing financial advisors.

On each episode of RightSize Cyber-Chats, we'll be speaking with some of the most plugged-in experts on advisor technology to help make sense of today's changing environment and be smarter about how we approach our work. We want to help you find ways to make the advisor experience more secure and successful.

Episode1: A Look Back and Forward

Wes Stillman and Alyson Nikulicz review the top RIA technology and cybersecurity trends from 2020, and what advisors can expect in 2021:

- RIA tech shifts that will outlive the Covid-19 pandemic
- Budgeting for RIA tech and cybersecurity spending in 2021
- Protecting mobile devices
- Protecting firms and identity management

The #1 tech trend in 2021