

What technology lessons advisers can learn from Delta Air Lines' system breakdown

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Practices should have multiple back-ups of their information, said Wes Stillman, chief executive of RightSize Solutions, a technology consultancy agency. Advisers also should periodically copy the information on their cloud-based software to a safe, secure location they can easily access if they were to lose web connectivity.

"It may not be the most efficient but you could still have it and still communicate," Mr. Stillman said.

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