

# Replay: Work from Home Tech Essentials: An RIA Case Study

May 18, 2020

In this webinar, our guest is Michael Israel, Managing Partner of Revolve Wealth Partners, shared insight on how he intentionally thought about creating a 'work-from-anywhere' tech environment and what he's learned during the current COVID crisis.

In this session, we explored:

- Identifying the non-negotiables of a strong firm technology infrastructure
- Creating effective workflows to streamline tasks and increase efficiency
- Utilizing shared drives give access to coordination between employee teams
- Changing 'social distancing' to 'social connecting' with video conferencing
- Training and activities that increase client service and employee satisfaction
- Establishing new routines and recognizing the work from home silver lining

This is an *essential* webinar to learn from a firm who's successfully incorporated technology in all aspect of their firm to maximize efficiency, productivity, and collaboration among employees, clients, and business partners.

Panelists:

- Wes Stillman, CEO and Founder, RightSize Solutions
- Michael Israel CFP®, Managing Partner, Revolve Wealth Partners