Rubin Wealth Advisors

RWA Technology

Each week you receive a very simple up to date report. Your time is your most valuable asset, which is why RWA has invested in tools and technology that keep you connected to your accounts 24-7. Easily access data that allows you to understand your financial picture from any connected device, anywhere in the world.

After all, the right technology can shape your experience allowing you to see a more holistic view of your financial future. This premise is why we continue to invest in powerful best-in-class technology which is user-friendly, convenient and provides you with both easy access to your accounts and additional peace of mind.

- **Client Portal:** Your client portal allows you to securely see all of your account balances while providing the ability to add outside accounts, including real estate and ownership in businesses. Every week you will receive an email with a comprehensive report that charts the performance of all your accounts for that week.

- **Risk Assessment:** The risk assessment provides clarity by continually helping you build or adjust the portfolios that are right for you. We can now easily communicate to where a portfolio is in and out of alignment with your risk tolerance, how it will perform in a variety of markets and make adjustments to bring it closer to your goals, comfort levels and current economic conditions.

- **Online Scheduling:** The endless checking of schedules is now a thing of the past. Scheduling a meeting in-person or on the phone has never been easier with our online tools. Select a time that works for you by visiting https://meetme.so/BobRubin

- **Interactive Meetings:** Conduct interactive meetings in the comfort of your own home with our secure screen sharing tool. Simply join a meeting through your tablet, phone or a computer - the choice is yours. Shared screen capabilities can be conducted on either side. Should you need help with the technology securely share your screen and we will walk you through any questions you may have, such as how to navigate the client portal or how to access your investment accounts through the financial institution.

Our ongoing commitment to provide our clients and top-tier technology and service is a significant part of the RWA Philosophy to create a better Quality for Life for you. Contact us today to learn more about the RWA advantage and how we can make a difference in your financial life.