



MATLIN FINANCIAL SERVICES

YOUR GOALS • YOUR VALUES

Helping a Financial Services Firm Work Effectively at Home *and* in the Office

About the Client

Matlin Financial is committed to building long term relationships with its clients. After all, the folks at Matlin understand that building and maintaining wealth is a long-term proposition not only spanning a lifetime, but multiple generations. It takes discipline, patience, and ongoing course corrections along the way. Accordingly, Curt Matlin and his team follow a formal process that leaves no stone unturned and focuses on their clients own desired outcomes. Over the years, Matlin Financial has expanded to support a wide range of clients and their families.

Business Challenge

Since 2016, RAM has been able to maintain a good relationship with Matlin Financial. Initially, RAM provided Curt and his team their NEC phone system for their new office location. At the time the system served Matlin Financial's needs well. Fast forward almost a decade later and it became clear the trusty NEC system just couldn't keep pace with the staff's new challenges. Perhaps the biggest challenge came in the form of *remote working*. Traditional PBX systems like the NEC just weren't designed to work efficiently in home and office environments. Both client and vendor realized it was time to start looking for a system that could meet new demands. The new platform would have to provide flexibility and easy access for both staff and RAM's support team. Everyone also realized there were some functions that didn't need fixing. The new system needed to continue providing simple call flows, call transfer, hold and conferencing functions. Sometimes the biggest challenge can be designing a system that incorporates traditional phone functions with newer hosted phone features.

RAM's Solution

Based on similar experiences with other clients, RAM knew it could deliver a successful outcome. Ultimately, RAM recommended Nextiva's hosted UCaaS platform. Nextiva would provide a unified phone platform with 4-digit dialing, mobile and soft phone apps, updated desk phones and updated headsets designed to compliment the new system. Matlin's staff took the time to work with RAM carefully outlining the necessary design details and functions. The research resulted in a design incorporating traditional functions with new soft phone features that enhanced everyone's productivity. Nextiva delivered the final product to RAM for pre-testing.

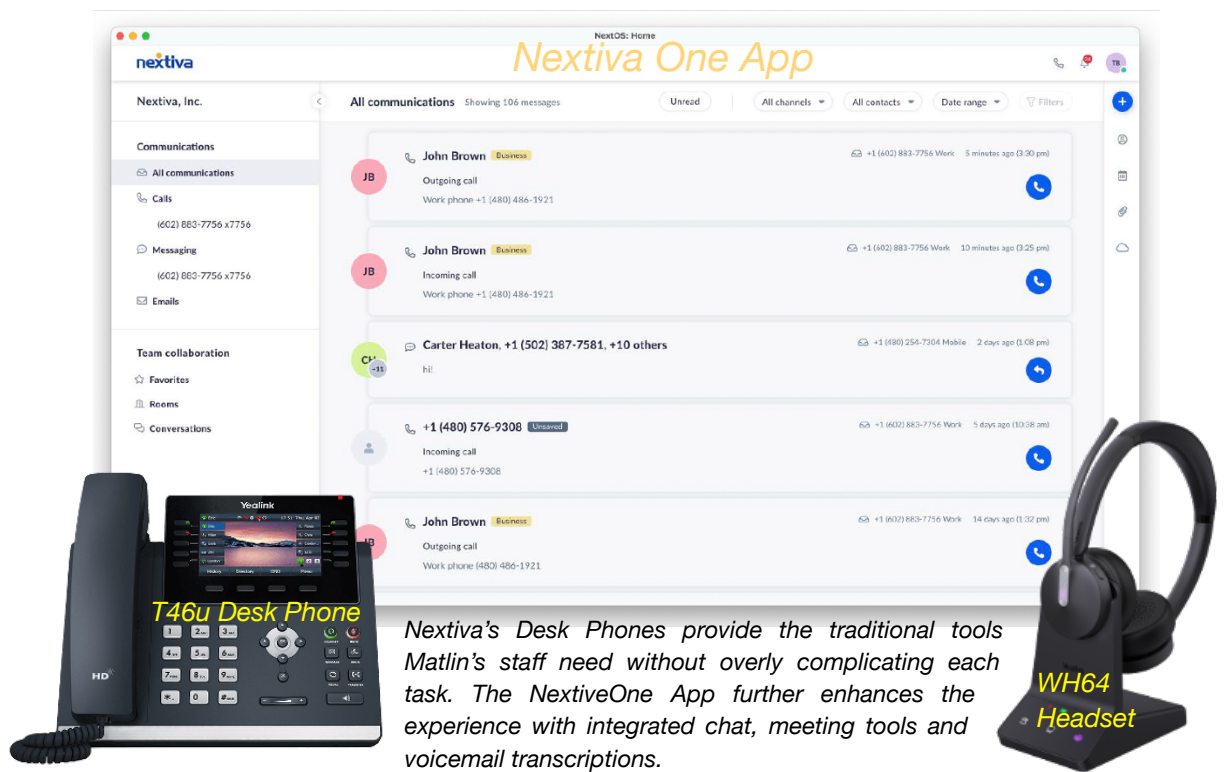
Next, RAM’s team delivered the new system, hands-on installation and several rounds of testing and tweaking to get the desired result. The time included testing and guidance for the new ‘remote office experience’.

Today, Matlin’s team enjoys the same office productivity at home with their new soft phone app called ‘Nextiva One’. Team meetings, phone calls, and team chat functions are all housed in the new app on each user’s laptop. The solution also saves desk space and hardware costs. Now, everyone can work remotely and interact efficiently with clients and staff members no matter where they are sitting.

Results

Overall benefits:

- **10% savings on updated service plans vs. old phone carriers**
- **reliable connectivity between office and remote users**
- **white-glove design, installation, testing and end user training from one source**
- **new tools help staffers communicate in more impactful ways (Nextiva One)**
- **periodic invoice reviews to ensure accurate billing and credits**
- **online system access saves time resolving support issues and programming updates**



Nextiva’s Desk Phones provide the traditional tools Matlin’s staff need without overly complicating each task. The NextiveOne App further enhances the experience with integrated chat, meeting tools and voicemail transcriptions.

“We’ve enjoyed working with Rob and his team. They are responsive and good communicators. Any issue we may have had was quickly resolved. And the new system they installed in 2025 is working great! Rob personally came to our office to demo the system, provide cost/benefit estimates (the price was great) and he was there for installation and training. Our experience with RAM is great and we highly recommend Rob and his team. Thank you, Rob, for quickly and easily solving our phone needs.”

**Curt Matlin, CLU, ChFC, CASL
President, Matlin Financial Services**