Safe & Secure

Your wealth management system employs advanced security features and protocols to keep your data safe, private, and secure at every hour of every day, year round.

Our comprehensive security measures include password protection, Secure Socket Layer encryption, firewalls, intrusion detection, audits, inspections, and more.

With each measure in place, you can be confident that your important information is safe and secure.

PASSWORD PROTECTION

• You have a unique username and password, ensuring that only you can access your information. Submitting incorrect login credentials three consecutive times will automatically lock your account for 10 minutes. This is to block any manual or programmed hacking attempts.

• In most cases, we have no access to your username or password. However, if you decide to provide us with this information, we will never share your username and password over the phone or send it to an email address not pre-registered with your account.

HIGHEST ENCRYPTION

• Our system uses a 256-bit Secure Socket Layer to scramble your data, further preventing access to unauthorized users. This is the highest level of encryption currently available today, and twice the standard followed by many financial institutions, including banks.

SECURED DATA

• We house your important data at secure, geographically separated data centers. Physical security measures at these facilities includes 24/x7/x365 on-site personnel and closed circuit video surveillance.

• These data centers also make use of fire protection, electronic shielding, and database backup procedures to ensure your data is continuously monitored and protected.

ROUTINE SECURITY TESTING

• Your wealth management system uses third-party security auditors and software, including TraceSecurity, Tenable Security and WhiteHat Security, to identify vulnerabilities within your system and to assist us with remediation efforts.