

Safe & Secure

Information Security Statement



Our Wealth Management System employs the most advanced security features and protocols to keep your data safe, private and secure, 24/7/365.

Comprehensive security protection measures include password protection, secure socket layer encryption, firewalls, intrusion detection, audits, inspections and more.

You can be confident that your important information is safe and secure.

Password Protection

- You have a unique User ID and Password. If three consecutive login attempts fail, the system automatically locks your account for 10 minutes, blocking any manual or programmed hacking attempts.
- Your User ID and Password will never be given out over the phone or sent to an email address that is not pre-registered with your account.

Highest Encryption

- Our system uses a 256-bit Secure Socket Layer to scramble your data to prevent access to unauthorized users. This is the highest level of encryption currently available today.
- Your data is so scrambled that trying to read it without authorization is like looking for a single grain of sand on miles of beach.

Secured Data

- We house your important data with premier data center providers with data centers in 19 U.S. markets and local service coast to coast. Physical security includes 24x7x365 onsite personnel and Closed Circuit video surveillance.
- Physical access at these world-class hosting server centers is limited to authorized personnel, and requires multiple levels of authentication, including biometric access control. These carefully selected data centers also make use of fire protection, electronic shielding, database backups and more to ensure your data is continuously monitored and protected.

Routine Security Testing

- Our Wealth Management System uses third-party security auditors and software including TraceSecurity, Tenable Security and WhiteHat Security to identify vulnerabilities within the system and to assist with remediation efforts.



I A D V I S O R