



“How to Prevent Identity Theft”

October 23, 2014

With email fraud and identity theft on the rise, your personal and financial information is in good hands.

The entire Foster & Motley team is dedicated to keeping your personal and financial information safe by combining the right people with the right processes.

The Right People: Personnel & Training

Our commitment to your security starts and ends with our employees. We are highly selective with who we bring onto our team to ensure that you consistently receive the exceptional service, professionalism, and privacy that you deserve.

- ✓ All prospective Foster & Motley employees undergo an extensive screening process, including verification of professional references and a thorough background check for criminal and credit history.
- ✓ All employees and vendors are required to sign a confidentiality agreement to further protect your privacy.
- ✓ All employees are continuously trained to adhere to our written policies and procedures and to be vigilant and proactive in monitoring for suspicious email or account activity.

The Right Processes: Computer Software & Online Security

When it comes to keeping your personal and financial information safe online, we are continuously looking for ways to update our security practices and procedures to stay ahead of industry standards and increasingly sophisticated fraudsters.

- ✓ Our online “Client Vault” is a document management system with bank level security used to safely store and share your files. Documents are fully encrypted so that no one can ever view them without permission.
- ✓ Any time we receive a client email requesting that we take irregular account action (i.e. – fund transfers to a third party, changes of address, release of personal information, etc.) we’ll call you to receive verbal confirmation.
- ✓ We password protect all email attachments that contain sensitive information.
- ✓ All discarded personal documents and paperwork are deposited into a secure shredder bin at the end of each day.
- ✓ We enforce a strong password creation policy and require all employee passwords to be changed frequently at scheduled intervals.
- ✓ Our antivirus and spam protection software systems are consistently maintained and security updates are performed regularly.

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Charles Schwab & Co., our trusted custodian partner, understands the importance of cybersecurity and what it means to our firm and our clients. As part of their ongoing efforts they’ve created *SchwabSafe*[®]: a collection of security measures designed to keep your personal and financial information safe online.

These measures include a combination of behind-the-scenes authentication technology within their online channels, fraud detection monitoring of accounts, encryption of electronic transmissions, and ongoing privacy training for employees.

For more information on the *SchwabSafe*[®] initiative, please visit:

www.schwab.com/public/schwab/nm/legal_compliance/schwabsafe or search “*SchwabSafe*” on your internet browser.

