

How Your Data is Secured

Altruist

Our custodian who holds and transacts investment assets

Altruist takes strong measures to safeguard your information. When storing or transferring data, advanced encryption is employed via Amazon Web Services, ensuring the security of your sensitive details. Your personal information is wrapped in a powerful 256-bit encryption, making it virtually impossible for anyone to access it without authorization. This includes passwords, which are secured using sophisticated techniques that keep them unreadable even if there were a breach.

To guard against phishing, Altruist uses Mobile Device Management which can remotely secure and control employee devices in case there's a security concern. They also have extra layers of defense with anti-virus software, firewall, and employees well-trained to recognize threats. Altruist is voluntarily SOC-2 compliant, meaning independent experts have confirmed they meet high standards in securing and managing your data with top-notch security and care.

You might receive an email alert from Altruist if their systems detect login activity from an unfamiliar device or location. This is a routine component of their security procedures.

RightCapital

Our financial planning and modeling software

RightCapital places a high priority on safeguarding user data with strong security measures. They rely on Amazon Web Services, meeting top industry standards. Data center security includes security guards, tightly controlled access, fire detection, video surveillance, and backup power systems. Network protection includes robust firewalls and measures against various attacks.

Data transmission is secure with HTTPS, and personal information is stored using robust 256-bit encryption. Two-step verification adds an extra layer of account security. Banking credentials are securely managed through Envestnet | Yodlee, a leader in data utilized by 11 of the 20 largest banks in America. RightCapital ensures that no one, including the client, can move money within their platform. Daily backups and a disaster recovery plan further fortify data protection.

Asset-Map

Our financial inventory mapping tool

Asset-Map upholds a robust information security program aligned with ISO 27001, a widely recognized standard for managing and securing sensitive data. This involves safeguarding systems and data through encryption, firewalls for network security, physical security measures to prevent unauthorized access, and regular audits and procedure reviews. Hosting is powered by Amazon Web Services, a top-tier provider with extensively verified systems, policies, and facilities.

