

DO'S & DON'TS



CREATE STRONG PASSWORDS that are 8-12 characters with a combination of cases, symbols, and numbers



CHANGE YOUR PASSWORDS often



SET UP DUAL AUTHENTICATION on your email and any other sites where it is offered



REQUEST A LINK from your advisor to upload files to us **OR SIGN UP FOR A PORTAL** and use it to send us any document



FREQUENTLY REVIEW your financial statements for unusual activity



IF YOU SUSPECT FRAUD, CALL US so we can help determine the appropriate actions to be taken



BRING YOUR PERSONAL PAPERS TO US to shred



DO NOT TRANSMIT OR SAVE PERSONAL INFORMATION in emails: SSN, DOB, account numbers, etc



DO NOT GIVE OUT PERSONAL INFORMATION over the phone



DO NOT EMAIL SIGNED DOCUMENTS (an email hacker could steal your signature)



DO NOT SHARE YOUR PASSWORDS with other people



DO NOT USE THE SAME PASSWORD TWICE (especially with banking/email, etc.)



DO NOT CLICK ON LINKS FROM UNKNOWN SENDERS
Hover over links to confirm true URL as they could be a phishing attempt



DO NOT USE FLASH DRIVES THAT ARE LEFT IN PUBLIC/OPEN AREAS as they could contain viruses