

Investor360° SaaS Platform Security and Data Protection

Advisor360° is committed to protecting all data under our stewardship. We recognize and understand the trust placed in us and our responsibility in protecting your clients' most sensitive information.

Advisor360°'s information security program is based on recognized industry best practices and standards. We invest heavily in technology, our people, and processes to ensure the best possible protection and service to you.

Accessing Investor360°

All Investor360° users have their own unique User ID and password combination along with multi-factor authentication to increase the level of assurance that only authorized users have access to Investor360°.

Securing your Data

When accessing Investor360° either through the website or mobile application, all communications are encrypted using the Advanced Encryption Standard (AES-256). Likewise, from a data at rest perspective, all data stored in our systems is encrypted by default to further protect your data.

Security Monitoring and Incident Response

Proactive 24x7 security monitoring and alerting is in place to ensure the integrity of the platform and data. All suspicious events are prioritized, risk ranked, and remediated in a timely manner.

There are multiple layers of network-based security technologies all working together to identify, block, and report on suspicious activity. Advisor360°'s security analytics platform allows us to baseline normal end user behavior in order to identify and respond to suspicious behavior.

Third-Party Assessments

In addition to our own internal security testing, Advisor360° conducts regular penetration tests using a trusted third party to evaluate the strength of our security posture.

Advisor360°'s platform complies with the American Institute of Certified Public Accountants (AICPA) Trust Services Principles and is SOC 2 certified.

Advisor360° is a Software as a Service provider that builds and delivers integrated technology for wealth management firms. The company's proprietary Unified Data Fabric™ synthesizes complex and disparate data streams into one platform for a highly sophisticated wealth planning solution. Today, 3 million households representing \$1 trillion in assets benefit from the integrated Advisor360° experience.

To learn more, visit advisor360.com