



Your Security is Very Important to Us

We take your trust and security very seriously. Your personal and financial information on AdviceWorks™ is protected and monitored continuously with robust security solutions and processes that adhere to regulatory requirements and industry best practices for cybersecurity.

Security Measures in Place to Protect Your Personal Information

We've worked to develop multiple layers of protection, so your information stays safe.

Multi-Factor Authentication

AdviceWorks' advanced authentication per device requires a combination of your password plus one other factor.

Linked Assets and Liabilities

We're committed to collaborating with outside providers who can help you work with your financial professional to safely and securely pursue financial well-being. We currently include Envestnet® | Yodlee®. This is an industry-leading provider of cloud-based financial technology services. This helps ensure that when you link accounts held outside of AdviceWorks, your confidential data remains secure. *To learn more, visit www.yodlee.com/legal/yodlee-security.*

Secure Vault for Personal Information and Sharing

Securely share personal documents, at your discretion, with your advisor from our cloud-based vault at any time, from anywhere.

Financial Data Security

Your information is protected using data encryption—technology that scrambles the data, making it unreadable to unauthorized parties.

Cyber Threat Monitoring

AdviceWorks is regularly scanned for any vulnerabilities that could be exploited.



Want more details? See our [Privacy Policy](#) and [Consumer Privacy Notice](#), both available under Quicklinks on AdviceWorks.

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

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