

Client Account Security

➔ HOW SECURE IS MY FINANCIAL DATA?

Very. We use various practices, policies, and technology to ensure not only is your data locked down, but also limited to what is needed by your advisor. Read on to learn more.

➔ HOW IS MY DATA SECURED? WHAT DO YOU DO TO ENSURE IT IS SAFE?

Physical security: We use Amazon Web Services (AWS) to hold your data. It's physically under lock and key, using multilayer access, alerting, and audit measures.

Ongoing audits: RightCapital uses frequent internal and third-party testing to remain up to safeguard data. Employees also receive ongoing security and data protection training.

Backups: Your data is backed up and replicated to geographically separate locations. These safeguards are in place to ensure your data remains intact and online.

Encryption: All data that is transferred and stored is encrypted using bank-level encryption practices. Data in transit and at rest is encrypted using industry-standard HTTPS protocols and uses AES-256 encryption algorithms.

We do not store credentials for external accounts: We do not store the login credentials you use to link external accounts. We partner with Yodlee, known for their expertise and thorough security practices. We use authentication tokens to communicate with Yodlee so RightCapital receives read-only information and cannot access your credentials. No system or person at RightCapital can reverse-engineer your credentials either.

What does RightCapital do with my data? The portal cannot be used to make transactions. Your data is read-only and used to do things like create budget reports for you and enabling you and your advisor to track investments, loans, and other accounts for your financial plan.

➔ WHAT DOES RIGHTCAPITAL USE MY DATA FOR?

We do not sell your data. It's yours, not ours. Your data is expressly for you and your advisor as building blocks for your financial plan. It is designed for your successful outcome of better understanding and improving your financial plan.