

Protecting Your Data & Money

Safeguard email accounts

- Be very cautious when viewing unsolicited email.
- Do not click on links or pop-up ads in unsolicited emails.
- Know that many scams involve hacking emails and impersonating the account owners to gain access to sensitive information and /or money.

Be strategic with usernames and passwords

- Make passwords strong with at least 8-12 characters, include upper and lower case letters, numbers and symbols.
- Change your passwords often or use a password vault.
- Never use confidential data or information that is easily found about you online in your user names or passwords.

Limit what you share online

- Be very selective about what you share on social media and with whom you share it.
- Set privacy and security settings on web services and devices to your comfort level for sharing.

Surf safely

- Use only trusted networks, APPs, and computers.
- Know that secure websites start with https, and NOT http.
- Never click on links or attachments from unknown sources.

Protecting your money

- Review all your financial statements when available and immediately report anything suspicious.
- Never send your personal identifiable or account information via unsecure channels like email, chat, text.
- Be aware of our firm guidelines for client verification and funds disbursement requests.

Source: Charles Schwab & Co., Inc.