

Information and Cyber Security Program

Information Security

Financial Freedom House (“FFH”) maintains an information security program to reduce the risk that clients’ personal and confidential information may be breached.

- The doors leading to FFH’s office suite, IT room, and file room are each locked after hours and secured by a Bosch Burglar Alarm System File maintained and monitored (with cellular backup) by Detection Systems and Engineering. *For more information visit www.dsesecurity.com*
- Client files not in the direct possession of the adviser or staff member working on the file are stored in FFH’s locked file room or locked adviser/staff offices.
- Confidential client information such as account statements, personal information, etc... will only be transmitted via upload to FFH’s secure online client portal, USPS, Fed Ex, UPS, dedicated facsimile, or encrypted email.
- FFH’s server is hosted on Microsoft’s Azure platform. In addition to Microsoft’s security and backup protocols, FFH has retained Centaris (formerly Center for Computer Resources) to provide business class security, email encryption, and advanced networking and connectivity services. *For more information visit www.centaris.com*
 - Inbound and outbound email security and encryption is monitored and maintained by Centaris utilizing Avanan’s Microsoft 365 enterprise security solution. *For more information visit www.Avanan.com*
 - Centaris protects FFH’s data, email, and computers by monitoring and maintaining an array of physical security appliances and technological safeguards, including hard drive encryption and DUO multi-factor authentication (www.duo.com), designed to protect against threats such as virus, intrusions, phishing, and data theft.
 - FFH’s data and server is backed daily across multiple servers. This system is monitored and maintained by Microsoft and Centaris
- FFH has engaged Smarsh, Inc. (an email security, encryption and archiving company) to securely archive its email. *For more information visit www.Smarsh.com*
- FFH uses Envestnet | Tamarac’s Advisor CRM as its customer relationship management (CRM) software. This web-based application and its security is maintained by Envestnet | Tamarac. *For more information visit www.TamaracInc.com*
- FFH uses Envestnet | Tamarac’s Advisor View as its recordkeeping, performance reporting, and billing software. This is also the platform FFH uses to provide and maintain its secure online client portal. This web-based application and its security is maintained by Envestnet | Tamarac. *For more information visit www.TamaracInc.com*
- FFH uses Envestnet | Tamarac’s Advisor Rebalancer as its rebalancing and portfolio management software. This web-based application and its security is maintained by Envestnet | Tamarac. *For more information visit www.TamaracInc.com*

In addition to the above, the professional liability policy FFH Financial Planning, Inc. maintains with Lloyd’s of London includes an endorsement for cyber coverage (computer network security and privacy coverage).