Protect Your Identity

Identity theft can put your assets, credit, and long-term financial goals at risk. Taking a few proactive steps can help protect your accounts and your financial future.

1. Safeguard personal information

Personal information can be used to gain access to financial accounts or commit fraud.

- Share sensitive information only when necessary and with trusted providers.
- Limit unnecessary data sharing.
- Securely destroy documents containing personal or financial information.

2. Strengthen account security

Compromised passwords can provide unauthorized access to investment and financial accounts.

- Use unique passwords for each account.
- Consider a password manager.
- Enable multifactor authentication (MFA) whenever available.

3. Be alert to fraud and impersonation scams

Criminals often impersonate financial institutions, advisors, or service providers to obtain personal information.

- Be cautious of unsolicited or urgent requests.
- Verify emails, texts, and calls before responding.
- Avoid clicking suspicious links or attachments.

4. Monitor financial and credit activity

Early detection can mitigate potential financial losses.

- Regularly review account statements and transaction activity.
- Monitor your credit reports.
- Set up alerts for unusual account activity.

5. Consider a credit freeze

A credit freeze can help prevent fraudsters from opening new accounts in your name and is free to implement.

- Place a security freeze with Equifax, Experian, and TransUnion.
- Temporarily lift the freeze only when applying for new credit.
- Keep your account credentials secure for easy freeze management.



THE BOTTOM LINE

Protecting your identity is an essential part of protecting your wealth, investments, and long-term financial security.

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