

Thursday, April 2, 2020

KEEPING OUR CLIENTS' RECORDS SECURE

IN THE OFFICE OR REMOTE: YOUR DATA'S SAFE WITH US

While our physical offices are temporarily closed as a precaution to help slow the spread of coronavirus, Mercer Advisors financial advisors and other support staff continue working from home to serve clients. As we rely even more heavily on virtual communications and data sharing over digital pathways during this time, you may be wondering how we protect your sensitive personal information and financial transactions.

Nothing has changed—and that is good news.

Multi-layered security and privacy protections surround all Mercer Advisors technology systems, devices, internal documents, and client data. So, doing business with our teams remotely is as safe as when we're in our offices.

Here are some of the measures we've taken to safeguard your information and finances—not just during the coronavirus crisis but every day of the year.

SECURING CLIENT DATA

One of the fundamental ways we protect clients' personal and account information is by making those records accessible only by authorized team members for specified activities, such as completing a trade or sending a monthly statement.

We also encrypt data stored and transmitted on all Mercer Advisors devices—including our telephone systems, laptops, and employees' smartphones.

Our business software platforms and applications are protected by single sign-on technologies, which means that client information can only be accessed using a Mercer Advisors device. This security measure helps prevent cybercriminals and other unauthorized users from hacking in remotely, even if they obtain a password.

Using the mobile device management safeguards installed on team members' mobile devices, such as phones and laptops, we can wipe—or delete—all data from the device remotely in the event it gets lost or stolen. In addition, we protect Mercer Advisors devices with sophisticated antivirus software to thwart hackers.

SAFEGUARDING COMMUNICATIONS WITH CLIENTS

Along with encrypting our telephone systems to prevent conversations from being intercepted, we use password protection and encryption when conducting virtual meetings and webinars. This helps ensure that sensitive financial information displayed on screen during a video conference between a client and her advisor can't be retrieved by anyone else.

Our email servers also encrypt client communications and data. For financial transactions such as wire transfers that come to us in email, we always call the client to confirm that they initiated the transfer in order to prevent unauthorized transactions.

GUARDING INFORMATION STORED INTERNALLY

We maintain industry-leading security defenses around our file sharing systems and storage platforms to safeguard confidential data. This includes end-to-end protection of account information within our customer relationship management system.

Mercer Advisors also contracts with an independent cybersecurity company for 24/7 monitoring of our firewalls and network traffic. This gives us even stronger protection against malicious software, computer viruses, denial-of-service attacks (i.e., flooding a targeted machine with requests until normal traffic is unable to be processed), and other sophisticated intrusions.

PROTECTION YOU CAN COUNT ON IN EVERY SEASON

Our most valuable asset is the relationship we maintain with our clients. We honor and serve this relationship by upholding the highest standards of trust and confidence, which includes keeping client information secure and private at all times.

We continually review and refine our protective measures to make sure they stay ahead of ever-evolving threats.

Mercer Advisors' cybersecurity policies and procedures are periodically audited by the U.S. Securities and Exchange Commission.

In this time of uncertainty, one thing will never change: our team puts your interests first and keeps your information secure—regardless of where we're working.

If you have any questions, please reach out to our compliance team at privacy@merceraadvisors.com. Visit our [Privacy Center](#) to learn more about how we safeguard your client information and read our recent article about [how to keep your digital assets safe](#).