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Hillis Financial Services Hosts Event on Identity Theft and Security Fraud

One of LPL Financial's top advisors helps community understand the impacts of identity theft and online security*

San Jose, Calif. — July 25, 2016 — Hillis Financial Services, a San Jose-based independent wealth management firm, recently hosted a timely seminar on the topic of identity theft and security fraud at the Golf Club at Boulder Ridge on July 7 for clients and guests. The seminar "Identity Theft and Online Security" featured guest speaker Matthew Beck, Vice President and Financial Advisor Consultant at American Century Investments, and had approximately 60 attendees. The event was hosted by Hillis Financial Services President John L. Hillis, Executive Vice President Caroline Delaney and Senior Vice President Henry Goldstone.

With more than 15 years of investing experience in the financial services industry, Beck's discussion was aimed to provide investors with steps they can take to help avoid becoming a victim of identity theft and online security fraud. Key topics of discussion during the event included a breakdown of identity theft, security fraud as it relates to social media, and key things to consider when protecting yourself from identity theft.

"At Hillis Financial Services, we place an emphasis on educating clients and the local community about topics that are current and relevant to their financial lives," said Hillis. "Knowing how to avoid becoming a victim of identity theft and security fraud is so critical in maintaining a financially secure future."

Hillis Financial Services has been a trusted San Jose wealth management firm since 2001. Mr. Hillis has more than 40 years of experience providing financial planning and asset management advice to individuals, corporate executives and business owners.

About Hillis Financial Services

Hillis Financial Services is an independent, personal wealth planning firm focused on managing the "irreplaceable assets" of its clients, families and individuals, many of whom are small business owners. The firm uses a conservative approach to its proactive client portfolio management, believing that managing downside risk can be more important in today's economy than seeking upside growth. As independent representatives of LPL Financial, the financial professionals at Hillis Financial Services, primarily provide unbiased fee-based advice and services including personal financial, retirement, education, tax and estate planning; long-term care, charitable giving as well as risk management. The financial professionals build customized asset allocation portfolios of stocks, bonds and alternative investments for their clients. The team has more than 70 years collective experience in managing portfolios, and many clients have been with the firm's advisors for more than 30 years. The firm is based in San Jose, California. For more information, please visit www.hillisfinancial.com.
The financial professionals at Hillis Financial Management are registered representatives with and securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.
Hillis Financial Services, American Century Investments, and LPL Financial are separate entities.
*John Hillis is a member of the LPL Chairman's Council which represents less than two percent of LPL's advisors nationwide, based on annual production.