



### AllData Advisor®

## Ensure the Security and Privacy of Users

In an age where technology is integral to our daily lives, it is more important than ever to protect personal information from the threat of cybercriminals. Ensuring the security and privacy of users is the cornerstone of AllData Advisor from Fiserv.

AllData Advisor is the industry's leading account aggregation service. Delivering data from more than 13,000 sources, AllData Advisor creates a comprehensive view of client portfolios and provides greater client insight to broker-dealers and advisors. With this insight, advisors are more effective at establishing trusted relationships and bringing in more assets.

### Security at Every Level

AllData Advisor is supported by an infrastructure built to the highest standards. Fiserv aggregates data using three highly secure methods that ensure all sensitive data, including user IDs, passwords, PINs and responses to challenge questions, remains private and protected.

Our secure hosting environment is monitored 24 hours a day, 7 days a week by security experts. All server access requires multiple levels of authentication, and two layers of firewalls prevent unauthorized electronic access to all servers and all secure information.

Our application security leverages multilayered, state-of-the-art hardware and software encryption to ensure that sensitive information and personal data are protected at all times. Data is never stored or displayed in clear text in the AllData Advisor database, application or log files. Because AllData Advisor is a view-only system, it allows only advisors and their staff to view held-away financial data. No one can move any money, or make any trades or transactions.

All information is hosted at two highly secure, top-tier global data centers, supporting and

protecting mission-critical Internet operations. Data is not accessible to any unauthorized individuals, and numerous security checks have been built into the application to guard against intrusion attempts.

### Controls and Processes

Fiserv is SAS 70 Type II compliant. Our infrastructure, application, processes and controls are audited regularly by leading third-party providers, certifying that AllData Advisor remains impenetrable. This includes our security practices, which are audited and approved annually by external security experts, and our architecture, which is consistently upgraded to ensure that client data and information are completely secure. We also perform routine system integrity checks of the firewalls and other network control systems.

Security and privacy are the foundation of the AllData Advisor aggregation service. With this continued focus, we have made aggregation a viable and highly beneficial addition to the financial advice industry.

### Connect With Us

For more information on AllData Advisor, please contact us at 800-872-7882 or visit [www.fiserv.com](http://www.fiserv.com).

**Fiserv, Inc.**  
255 Fiserv Drive  
Brookfield, WI 53045

800-872-7882  
262-879-5322  
[getsolutions@fiserv.com](mailto:getsolutions@fiserv.com)  
[www.fiserv.com](http://www.fiserv.com)