

Personal Security from All Angles

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Key Personal Security Concerns

Cyber Fraud



Managing Your Digital Footprint



Safety and Security Around Your Home



Vetting Household Help and People with Access



Travel Security Concerns

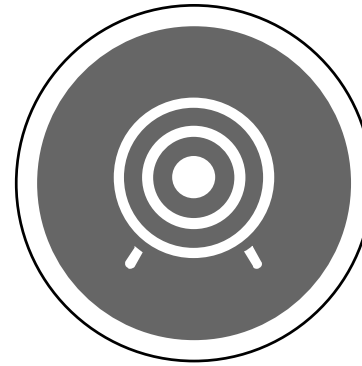
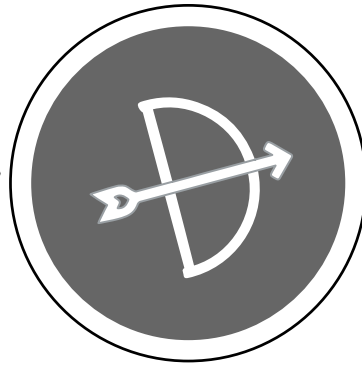


Elderly Exploitation



Cyber Fraud

Who is the adversary?



Who is the target, and how is the game played?

Defensive Strategy



Use two-factor authentication



Freeze your credit



Consider using a dedicated device for transactions and access to your finances



Prudent cyber hygiene: use unique/strong passwords, leverage alerts, use only trusted networks

Managing Your Digital Footprint

What's online about you and your family?

Are you putting a fraud target on your back?

Overlap with physical residence

- MLS listings/videos/photo tours remaining online
- Vacation plans online

Privacy compromised

- Family matters exposed
- Assets more transparent than desired
- Political and/or charitable giving disclosed

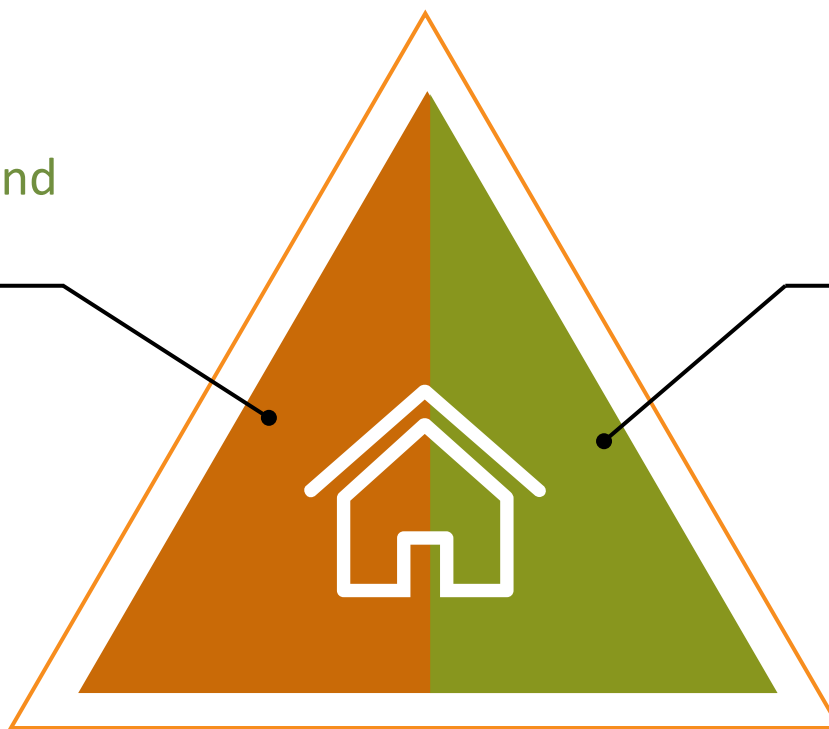
It may make sense to have a professional examine this for you

Safety and Security Around Your Home

Emergency **preparedness** and
scenario **planning**

Physical access
and **alarm monitoring**

- **FidSafe[®]**



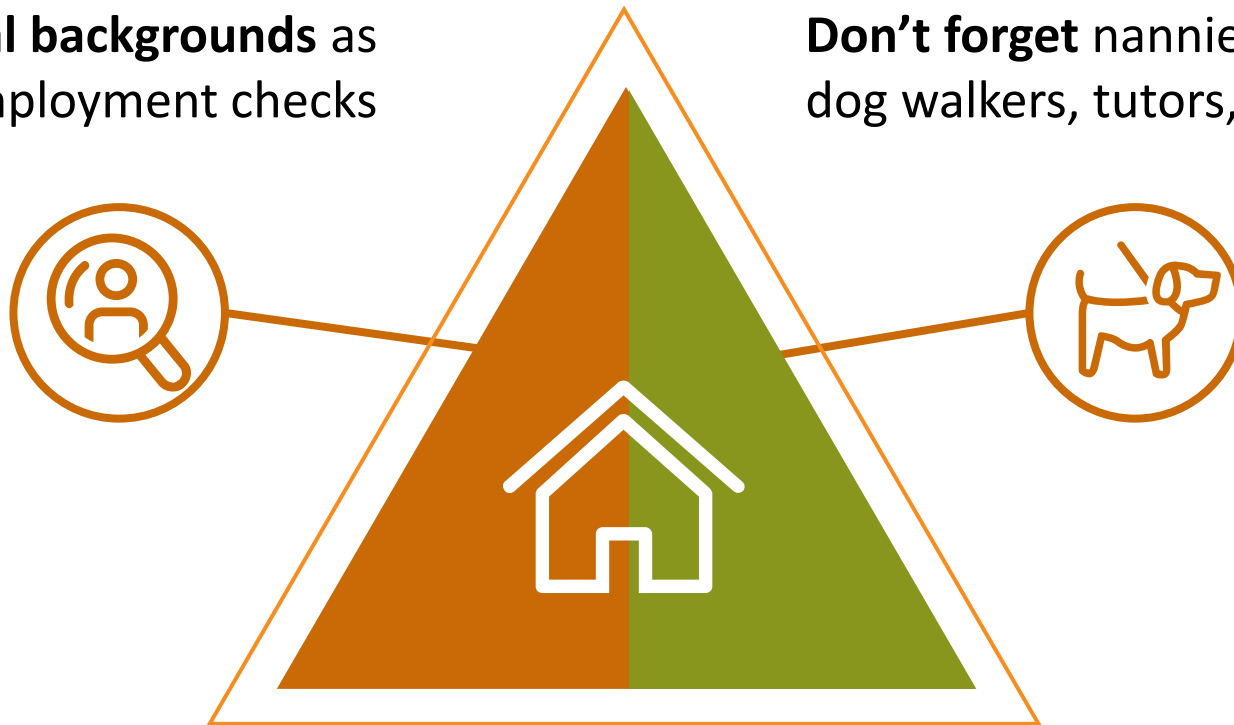
You may want to have an expert perform a
risk assessment of your properties

FidSafe is not a Fidelity Brokerage Services LLC service. FidSafe is a service of XTRAC LLC, a Fidelity Investments company.

Vetting Household Help and People with Access

Consider **criminal backgrounds** as part of pre-employment checks

Don't forget nannies, house cleaners, dog walkers, tutors, drivers, etc.

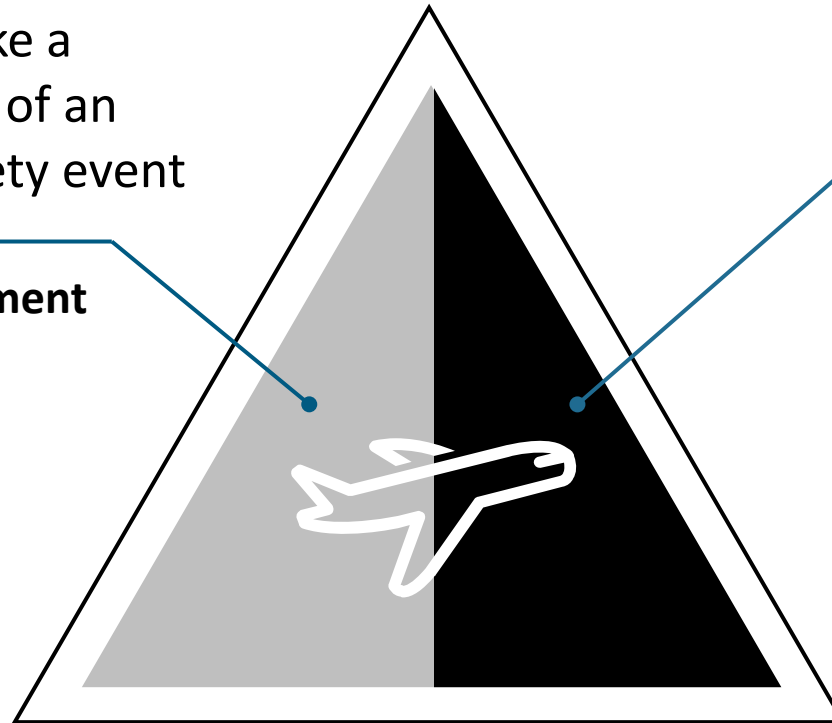


Do you really know all the people with
access to your home?

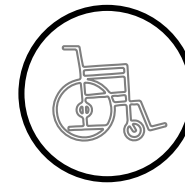
Travel Security Considerations

Advance planning can make a world of difference in case of an unforeseen medical or safety event

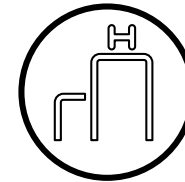
- Leverage **U.S. State Department travel programs**



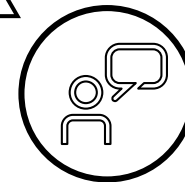
Consider **travel medical insurance**



Major accident



Evacuation to proper hospital

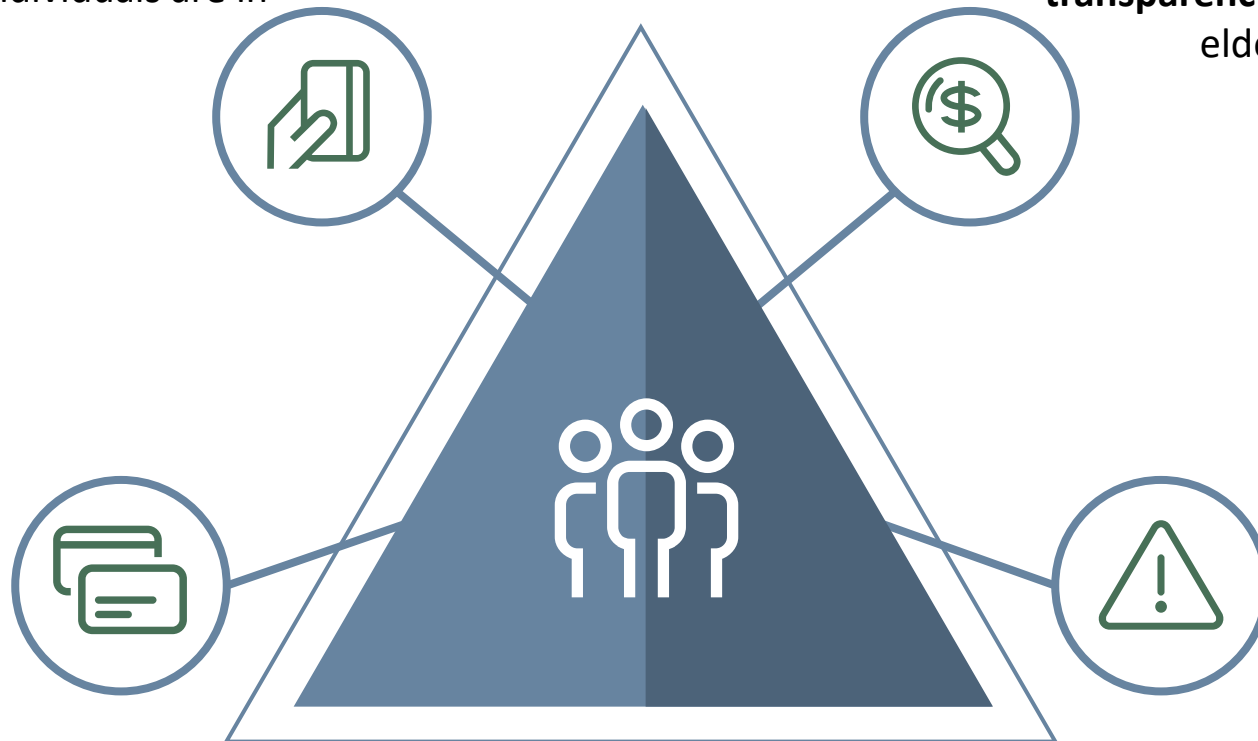


Communication with foreign doctors

Elderly Exploitation

Exploitation is unfortunately very common – particularly when individuals are in **cognitive decline**

Select a trusted person to have **transparency of activity** into the elder person's accounts



Perpetrators include fraudsters and con men but also those known to and trusted by the victim, e.g. **immediate and extended family and caretakers**

Leverage **alert capabilities** on accounts

Resources

<https://www.fidelity.com/security/overview>

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We're committed to your security

We safeguard your accounts with strong encryption, firewalls, secure email, and proactive 24/7 system surveillance.

Additional security protection against fraud

We offer these extra measures for the different ways you do business with us.

- Extra login security**
For online access: download an app for security codes to use in addition to your username and password.
- 2-factor authentication**
For some sensitive transactions: a security code is sent via text or voice call to your phone, to verify your identity.
[See more of our security measures](#)
- Fidelity MyVoiceSM**
For when you call us: voice recognition technology for account security, as unique as your voice.

Fidelity Customer Protection Guarantee

We're proud of the trust you place in Fidelity and want to ensure that you have peace of mind when doing business with us. That's why we offer this guarantee: We will reimburse you for any financial losses that result from unauthorized activity on your accounts.

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If you use the same username or password at Fidelity and other online sites, your accounts could be at risk. Use strong, different passwords for each of your online accounts.

[Change your password now](#)

Add two-factor authentication

<https://www.fidelity.com/security/soft-tokens/overview>

Freeze your credit— contact the three national credit bureaus: Equifax[®], Transunion[®], Experian[®]

Consider alerts on your account

U.S. State Department—Smart Traveler Enrollment Program

<https://step.state.gov/>

Emergency preparedness for your home and family www.fema.gov

Storing critical documents in a secure digital repository

www.fidsafe.com

How to add voice biometrics on your Fidelity account

<https://www.fidelity.com/security/fidelity-myvoice/overview> 1-800-FIDELITY

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