



Your advisor is on Altruist.



Altruist is a custodial solution helping over 1,000 financial advisors keep their clients' money and investments safe*. Altruist's mission is to make independent financial advice better, more accessible, and more affordable.

Altruist's Asset Protection Guarantee.

Altruist is regulated by government agencies including the Securities and Exchange Commission (SEC) and the Financial Industry Regulatory Authority (FINRA), and is staffed by a seasoned internal compliance team. Through their asset protection program, cash and securities lost due to unauthorized activity will be reimbursed, so long as the basic security requirements are met (e.g., unique password, 2-factor authentication, etc.). More information about the asset protection policy can be found [here](#).

Your assets are insured with industry-standard policies.

Brokerage accounts are protected up to \$500k, including \$250k for cash*. Altruist's clearing partner has arranged for supplemental insurance coverage that protects securities and cash up to an aggregate of \$150 million, subject to maximum limits of \$37.5 million for any one customer's securities and \$900k for any one customer's cash. Altruist keeps your personal information safe with around the clock monitoring and AES 256 encryption, the most robust commercial encryption available.

Enjoy full visibility into your finances.

From Altruist's website or mobile app, you can:

- Track your portfolio's performance
- Open accounts and transfer funds in minutes
- Review digital statements

This means more visibility into your money at all times.

The Altruist Promise

Security + Insurance + Visibility = The Ultimate Client Experience.

*Keep in mind, this coverage does not include market losses. Member of [SIPC](#). Securities in your account protected up to \$500,000. For details, please see [sipc.org](#).

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