

Client Portal: Security

GM Advisory Group is pleased to provide our clients with a customized Client Portal. GMAG's Client Portal is built on Microsoft's SharePoint which is designed to enable users to securely share, store, and manage information.

As a part of GMAG's commitment to technology, we have recently implemented Microsoft's Cloud Platform and we selected SharePoint as the platform for sharing vital information with you and across our organization while protecting your documents. The system also restricts access to confidential client information to authorized users only.

Security Features of SharePoint:

- **Protected Data:** Microsoft SharePoint Online hosted data is always encrypted in transit and at rest. Encryption encodes data so that only the intended users will have access.
- **Availability:** Microsoft's facilities are located around the globe, which allows systems to operate if there is a failure in one location. Microsoft also performs continual backups which allows for quick recovery of lost or corrupted data. Our clients will benefit from Microsoft's 99.9+% uptime in accessing their data.
- **Audited and Compliant:** Microsoft SharePoint Online is regularly audited and meets all regulatory compliance requirements. This ensures that the platform has passed stringent security audits to safeguard data.
- **Privacy Settings:** SharePoint allows for granular control of client privacy and access to data. This ensures that only authorized users have access to data.
- **Physical Security:** Microsoft SharePoint is hosted within Microsoft's facilities that does not allow for unauthorized physical access.

Information security risks exist even with the best efforts and intentions. No matter the efforts taken to minimize those risks, a breach of security may occur. A breach could occur if the secure credentials of client or a GMAG team member are compromised, or if a third-party vendor experiences a security breach. We aim to mitigate these risks whenever possible.

Risks and best practices have been set forth in the Client Portal Agreement and Use Policy which is accessible at the bottom of the Client Portal web page or may be accessed by clicking here [[ADD HYPERLINK](#)]. Please make sure you read and understand our policies in their entirety.

