Client Data Security at Next Play Wealth

At Next Play Wealth, trust is not just part of our relationship with clients, it is the foundation of it. When you share your financial life with us, you are placing confidence in us to help protect not only your future, but also your personal information. We take that responsibility seriously.

We are committed to safeguarding client data through modern practices designed to reduce risk, preserve confidentiality, and support a secure client experience from the very beginning.

We operate with a **paperless-first mindset whenever possible**, because sensitive financial information sitting unsecured on paper creates unnecessary exposure. While there may be situations where physical documents are required, our standard is to minimize paper whenever we can and rely on secure digital systems to collect, store, and manage confidential information more responsibly.

When physical materials are necessary, we maintain processes and controls around how those materials are handled, stored, and accessed. Confidential documents are secured appropriately and made available only to authorized individuals when needed and authorized by the client (a mortgage broker on behalf of a client, for example).

We also believe that strong client protection starts with choosing the right partners. That is why we work with **best-of-breed custodians, technology providers, and service partners** whose security standards, compliance practices, and data handling policies have been carefully reviewed as part of our due diligence process.

This includes trusted platforms such as **Advyzon**, which supports key portfolio management and client reporting functions and offers a secure portal for document exchange, and **Altruist**, our custodial and account administration partner. These firms are selected not only for the quality of their client experience and operational capabilities, but also for their commitment to secure infrastructure, controlled user access, encrypted data handling, and ongoing oversight of their systems and environments.

Behind the scenes, we maintain **layered safeguards across our internal systems and networks** designed to help protect against unauthorized access, misuse, and data loss. Our tech-stack is supported through professionally managed infrastructure, including **firewall, VPN, multi-factor authentication, and network administration**, to help secure client information whether it is being accessed internally or remotely through approved systems.

Internally, access to client information is also carefully controlled. Sensitive client data maintained within our **internal, secure server environment** is protected through **access permissions and role-based restrictions**, helping ensure that only authorized personnel are able to access the information necessary to perform their responsibilities. We believe client information should be handled on a need-to-know basis, with access managed intentionally and responsibly.

We believe that protecting your information should not come at the expense of clarity, transparency, or service. Your information should remain secure, organized, and accessible in a way that supports your financial life, both now and over time. As part of that commitment, we value secure processes that also support **data portability, continuity, and long-term stewardship**.

Protecting client data is not just an operational issue, it is part of what it means to be a trusted fiduciary. At Next Play Wealth, we are committed to building a modern advisory experience that gives clients confidence not only in their financial plan, but also in how their information is cared for every step of the way.