



SECURITY OVERVIEW

World-class wellness with enterprise-grade security

Participant conversations and data are private.

- Employee data and guide interactions are **confidential**. We won't share any details or specifics of an employee's financial life with an employer under any circumstances.
- YML provides **aggregate reporting**, but only when there are sufficient participants to ensure **absolute anonymity**.
- Our guides will **not be able to see participant data** unless shared by the participant.
- We **will not sell, rent, lease, or share individual participant data**.

Financial accounts are connected with bank-level security.

- We use MX, an industry-leading solution, to power account integration and AI insights.
- MX uses **bank-level security**, used by H&R Block, US Bank, M&T Bank, and more.
- MX adheres to **SOC 2 Type II, PCI DSS, GDPR, and CCPA**.
- MX will **never use, sell, or share personal data** for any reason.

Your Money Line is committed to best-in-class controls.

- Data is hosted and processed in an **AWS data center** (SSAE 16 SOC2-compliant).
- Data is transferred using TLS 1.3.
- Data is encrypted at rest and in transport using AES 256 encryption.
- Completed SOC 2 Type I and SOC 2 Type II attestations.
- All employees & contractors complete **annual security awareness training**, and new hires complete background checks and E-Verify.
- Software Engineers are **trained with a security mindset** and coding best practices are implemented during the SDLC.
- **Multi-Factor Authentication** (MFA) is available with our Plus Plan.
- We carry **cyber liability insurance and technology E&O insurance**. COIs can be provided upon request.

For more information, visit the Your Money Line
Trust Center at trust.yourmoneyline.com