



SECURING WEALTH ADVISORS, RIAs, AND FINANCIAL PLATFORMS

Why Financial Firms Partner with Willis Security:

Financial organizations face rising cybersecurity expectations from regulators, clients, and institutional partners. Proper risk management and defense are no longer optional—they're mandatory.

✓ Key Cyber Risks for Financial Firms:

- Wire fraud and impersonation via Business Email Compromise
- Unsecure remote work setups and cloud access policies
- Lack of documented security controls and assessments
- Incomplete regulatory readiness for SEC or state requirements

✓ Our Cybersecurity Services for Financial Firms:

- Regulatory-Aligned Cyber Risk Assessments
- Cloud & Endpoint Security Hardening
- Security Policy Development & Incident Response Planning
- Employee Awareness Training & Executive Briefings
- Risk Monitoring & Monthly Reporting
- Preparedness for Third-Party Due Diligence and Audits

✓ We Help You Stay Compliant and Competitive:

We provide scalable cybersecurity expertise to help you protect assets, reduce risk, and respond to evolving regulatory expectations.

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