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S. Harris Financial Group
INNOVATIVE STRATEGIES + PERSONAL FOCUS

Timely Topic
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Protecting your Identity and Assets

Tax season is one of the most active times of the year for identity theft and targeted phishing attacks. With the number of scam phone calls on the rise here are a few quick steps you can take to keep yourself safe.

- 1. Never share your personally identifiable information.** If you ever receive an email from a friend or advisor like me requesting this type of information, contact them directly before responding.
- 2. The IRS will never threaten or demand payment over the phone.** If you receive a call like this, hang up and call the IRS back at a phone number you know is legitimate.
- 3. Review your credit card and bank statements/transactions frequently.** Your Wealth Management System can help you keep an eye on recent transactions and identify fraudulent activity immediately.
- 4. Always hover over links embedded in emails and confirm you know the address before clicking on the link.** In fact, it is best to go directly to the website instead of clicking on links in emails.
- 5. If you learn that your identity has been compromised or stolen, let us know as soon as possible.** We can flag your accounts at Raymond James for identity theft so that nobody can call directly to the Home Office and request any transactions. Instead, all requests would have to be initiated through our office once we confirm your identity.
- 6. There's much more you can do to stay safe,** like using firewalls and antivirus software or registering with the do not call registry.
- 7. Please call us with updates to contact information, especially email, phone numbers or addresses.** As a safety measure for you, we do not accept changes to contact information without verbal authorization.
- 8. Provide us with the name, phone number, and email address of a “Trusted Contact”.** This would likely be a family member or friend that we could contact if we suspect you are being scammed.

If you follow these quick tips, you'll have a good start on staying safe from scams. Feel free to reach out to one of our team members with any questions or to supply us with a “Trusted Contact” for your accounts.

The S. Harris Financial Group

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