



# Information Security Policy for Meritas Advisory Group, LLC

## 1. Introduction

This Information Security Policy outlines the essential guidelines and procedures for protecting the sensitive data of Meritas Advisory Group, LLC, its clients, and employees. This policy adheres to the General Data Protection Regulation (GDPR) and aims to safeguard all forms of data, including credit card information, career branding materials, and other confidential assets.

## 2. Scope

This policy applies to all employees, contractors, and any third-party individuals or organizations accessing or processing Meritas Advisory Group, LLC's data. It encompasses all company-owned devices, systems, applications, and physical documentation containing sensitive information.

## 3. Data Classification

Meritas Advisory Group, LLC classifies data based on its sensitivity level:

- **Highly Confidential:** Credit card information, Social Security numbers, passport details, and proprietary business information.
- **Confidential:** Client information, employee records, performance reviews, and internal financial data.
- **Internal:** Marketing materials, general documents, and non-sensitive employee information.

## 4. Data Protection Principles

- **Confidentiality:** Only authorized personnel are granted access to data based on the principle of least privilege. Access controls and encryption are implemented to restrict unauthorized access.
- **Integrity:** Data accuracy and completeness are ensured through data validation, backup procedures, and change management controls.
- **Availability:** Regular backups and disaster recovery plans guarantee data accessibility in case of disruptions.



- **Accountability:** All personnel are responsible for adhering to this policy and reporting any suspected security breaches.

## 5. Specific Data Protection Measures

- **Credit Card Information:** Meritas Advisory Group, LLC strictly adheres to Payment Card Industry Data Security Standard (PCI DSS) compliance when handling credit card information. This includes secure storage, transmission encryption, and access restrictions.
- **Career Branding Materials:** Client career branding materials are treated as confidential and protected with access controls and encryption when stored electronically. Physical documents are secured in locked cabinets.
- **GDPR Compliance:** Meritas Advisory Group, LLC implements measures to comply with GDPR requirements, including data subject rights, breach notification procedures, and data transfer limitations.

## 6. Security Controls

- **Network Security:** Firewalls, intrusion detection/prevention systems, and antivirus software are employed to protect against cyberattacks. Secure network protocols (HTTPS, VPN) are used for remote access.
- **System Security:** Operating systems and applications are kept updated with security patches. User accounts are secured with strong passwords and multi-factor authentication.
- **Physical Security:** Access to physical locations and data storage facilities is restricted and monitored. Sensitive documents are stored in locked cabinets or secured electronic environments.
- **Data Encryption:** Sensitive data is encrypted at rest and in transit to prevent unauthorized access in case of breaches.
- **Incident Response:** A documented incident response plan outlines procedures for identifying, reporting, and remediating security breaches.

## 7. Training and Awareness

Regular security awareness training is provided to all personnel to educate them on data protection best practices, identifying phishing attempts, and reporting suspicious activity.

## 8. Policy Review and Updates

This policy will be reviewed and updated periodically to reflect changes in regulations, technology, and business practices.

## 9. Conclusion



Meritas Advisory Group, LLC  
Business & Talent Strategists

By adhering to this Information Security Policy, Meritas Advisory Group, LLC demonstrates its commitment to protecting the sensitive data entrusted to it. By implementing and maintaining these security measures, the company safeguards its clients, employees, and business reputation.