

An Independent Registered Investment Adviser

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC



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S P R I N G 2 0 2 4

Financial focus

WHAT MATTERS MOST TO YOUR FAMILY, MATTERS MOST TO OURS.

AI Voice Impersonation Scams

Artificial Intelligence (AI) has made significant advances in many areas, including voice synthesis. This has given rise to a new type of scam known as AI Voice Fraud. It's a trick where a threat actor uses AI to mimic a familiar voice, like your boss or a family member, and then uses that as a disguise to ask you for sensitive information or to perform unusual tasks. These impostors sound so convincing, you might think you're talking to the person they're posing to be.

Best Practices for Protecting Yourself:

- 1. Preserve Your Voice:** Minimize the sharing of high-quality voice recordings and frequently monitor your online presence for unsanctioned uses of your voice.
 - ◆ When required to share voice samples, use trusted and secure platforms or professionals.
 - ◆ Regularly review and tighten your social media settings to control what you're sharing and with whom.
- 2. Boost Your Online Safeguards:** Use good online security hygiene to shield your personal information, including voice data.
 - ◆ Use robust, unique passwords for your accounts and enable two-factor authentication where possible.
 - ◆ Regularly update your security settings to lower the chances of unauthorized access.
- 3. Stay Informed and Alert:** Be wary of unexpected voice calls or messages, especially from unknown or suspicious sources. Always verify the identity of callers before sharing any sensitive information.
 - ◆ Consider establishing a code word system with colleagues or family members. If a call seems suspicious, ask for the code word to verify the caller's identity.
 - ◆ Researchers are developing audio watermarking and fingerprinting techniques to add unique identifiers to voice recordings. Keeping up with such advancements can add another layer of security.
- 4. Prompt Reporting:** If you suspect your voice has been cloned or misused, act swiftly.
 - ◆ Report suspicious activity or potential security incidents to your phone service provider, the local police, and to the Internet Crime Complaint Center at [ic3.gov](https://www.ic3.gov).

**All expressions of opinion reflect the judgment of the authors and are subject to change. Past performance may not be indicative of future results. Raymond James financial advisors do not render legal or tax advice. Please consult a qualified professional regarding legal or tax advice.*

Shred me, shred me not

Which documents to keep and which to toss (safely!)



Shred immediately

- Sales receipts (unless related to warranties, taxes or insurance)
- Canceled checks (unless tax-related)
- ATM receipts
- Paid credit card and utility bills
- Credit offers
- Expired warranties

- Pay Stubs
- Bank statements
- Paid, undisputed medical bills



Shred after one year



Shred after seven years

- Tax-related receipts
- Tax-related canceled checks
- W-2s
- Tax deduction records

- Vehicle titles (for as long as you keep the car)
- Home deeds (for as long as you live there)
- Pay stubs (until checked against your W-2)
- Disputed medical bills (until resolved)
- Home improvement receipts (until you've sold and paid any capital gains taxes)



Keep while useful



Keep for life

- Birth certificates or adoption papers
- Social Security cards
- Citizenship papers
- Passports
- Marriage or divorce decrees
- Family death certificates
- Tax returns (even if these are no longer on paper, it's still advised to hold on to the digital files)

DON'T TOSS YOUR IDENTITY. SHRED IT.

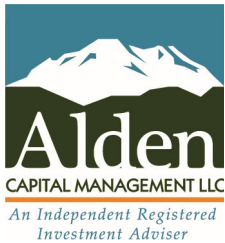
Dispose of confidential documents wisely at
our complimentary shredding reception.

You're Invited to our Shredding Event

You are invited to dispose of confidential documents at our shredding event! Too often we put ourselves at risk by tossing sensitive documents in the trash. If someone retrieves your personal information, like a Social Security number, your identity can be stolen in no time and your life turned upside down.

Tuesday, April 16th // 10:00 a.m. to 12:00 p.m.
at our office in Bellevue. Refreshments will be served.

Please call or email Eva to RSVP. Guests welcome.
425-451-8508 or eva.graff@raymondjames.com
Tuesday, April 16th // 10:00 a.m. to 12:00 p.m



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Alden News

Spring has sprung, and we could not be more excited for warmer weather and spring flowers! Spring is a time of growth and renewal, and we hope you and yours feel rejuvenated with brighter days ahead.



Baseball season is in full swing (pun intended) and we have 2 favorite baseball players we are following this year:

Laura's son Elliott plays for West Seattle Little League. He enjoys playing second base and batting.

Carol's son Brendan made the Bothell High JV team as a freshman.

He is proving to be not only a great pitcher which is his passion, but also a valuable batter for the team.



Announcing Donors Choose Winner!



Donors Choose Poll follow up! Last week we chose a winner from the 2 [DonorsChoose.org](https://www.donorschoose.org) projects we asked you to vote on. The winner was Project 1 - Mr. Grant: \$1,000+ for the MacBook Pro Special Education Project. Thank you for your votes!



Mr. Grant

Grades PreK-2
Graham Hill Elementary School