Protecting Yourself from Fraud

The entire financial industry is seeing a significant increase in the volume and sophistication of investment scams and attempted fraudulent transactions. Technology, specifically AI, is driving much of this increase. Below are some general tips for protecting yourself from fraud and some information specific to Cypress.

General Information About Protecting Yourself from Fraud

- *Go slow and ask questions.*
- Never click on links from unsolicited or unexpected emails or texts.
- Never provide personal data to unsolicited or unexpected texts, emails, or phone calls.
- Beware of urgency in the text, email or call. To incite action, scams will indicate you need to provide certain information immediately. The scam will often claim that failure to act will mean goods will not be delivered, payment won't go through, or your account will be shut down.
- If you are unsure about the authenticity of a text, email, or phone call, contact the organization through a separate method to confirm. Look up customer support on the website and call.
- Do not rely on voice or email recognition to ensure authenticity, these can be faked.
- Remain vigilant when it comes to email. Double check reply to, and sender addresses etc. make sure it's a reputable source.

Key Fraud Prevention Measures We Take at Cypress Are:

- We only send money to the named bank account on file or the CRA. We do not make third party external transfers.
- We deal directly with clients. You will not receive a request for information from the custodian (i.e. Raymond James Ltd, National Bank Financial, etc.)
- We will never ask you for passwords, including passwords to access Cypress account information.
- We have internal procedures to authenticate certain requests and will not update information simply through an email or phone message instructions.
- If you get a call from Cypress and the request seems unusual or odd in any way, hang up and call our main number and ask to speak to your Portfolio Manager or Portfolio Administrator.

Links to Outside Resources

BCSC - https://avoidaiscams.investright.org/
CSC – https://www.securities-administrators.ca/investor-tools/avoiding-fraud/
CIRO - https://www.ciro.ca/office-investor/avoiding-fraud-and-protecting-your-investments

Cypress Capital Management Ltd
Suite 1700 - 1055 West Georgia St
PO Box 11136
Vancouver, BC V6E 3P3

Tel 604 659 1850
Fax 604 659 1899
Toll Free:
1 877 659 1850