coconut
SOFTWARE

Rest Easy—
We Have Your
Data Covered

We adhere to industry-leading standards to keep your staff and customer information safe.

The financial services industry comes with unique privacy and security needs surrounding SaaS applications — and Coconut is built to surpass them. We abide by industry-leading standards to manage our network, secure our web and customer applications, and set strict security policies across our organization.

SOC 2 & ISO 27001 COMPLIANCE

Coconut Software is SOC 2 compliant and have passed our most recent SOC 2, Type 2 audit with no exceptions. We have also received our ISO 27001 certification. In addition to data center security and network security, **AWS data centers** provide exceptional operational security.

COCONUT EMPLOYEE CLEARANCE

All Coconut Employees must pass a standard criminal record check prior to employment. They must also sign non-disclosure agreements prior to employment and receiving any proprietary and/or sensitive data. All new staff are shown a privacy and security video as part of the onboarding and training process. Coconut has monthly privacy and security meetings to review policies and best practices. Coconut holds annual mandatory privacy and security training sessions for all staff.

MONITORING, FILE INTEGRITY AND INTRUSION DETECTION

We have a variety of methods and tools in place for intrusion detection, vulnerability monitoring, configuration monitoring, and file integrity monitoring. We also monitor for downtime, load time, and site responsiveness. As our platform is cloud based, it's very simple for us to rapidly ramp up capacity when needed.

FREQUENCY OF BACKUPS

We run full nightly backups along with incremental back-ups multiple times per hour.

BREACH NOTIFICATIONS

There have been no security breaches in the last seven years. In the event of the unexpected however, all breach notifications will be handled according to Canada's Personal Information Protection and Electronic Documents Act (PIPEDA, 2000), as amended by the Digital Privacy Act (DPA, 2015). For European Union clients, all breach notifications will be handled according to the EU's General Data Protection Regulation Act (GDPR, 2018). For more information, please visit Coconut Software's Privacy Notice & Terms of Use.

COOKIES - TO USE OR TO EAT

The only cookies we use are session cookies, which are short-lived and do not contain any personal info. For authenticated users, we use authentication cookies that are fully encrypted. Lastly, the team enjoys cookies for a jolt of energy on Friday afternoons - preferably chocolate chip.

DATA HOSTING

All data is stored in data centers according to the location of the headquarters of the organization. For security details related to application hosting environments, **click here**. For example: data from American organizations is stored in an American AWS data center, while data from Canadian organizations is stored in a Canadian AWS data center.

DOCUMENTS & PROCEDURES

We're pleased to provide your team with our in depth due diligence and vendor risk documentation, including but not limited to:

- **SOC 2 audit reporting**
- **ISO 27001 certification**
- **Enterprise Support Level agreements**
- **Disaster recovery plans**
- **Infrastructure reference architecture documents**
- **Perimeter and network assessments**
- **Documented Change Control policies**

PRIVACY & SECURITY FEATURES

Contact us if you'd like to review these details in more depth.

✓ U.S. Hosting	✓ SOC 2, ISO 27001, CASL & GDPR Compliant
✓ Canadian Hosting	✓ Incremental back ups every 5 minutes & nightly full backups
✓ Data Encryption: Amazon RDS Using AES-256	

Get up and running in as little as two weeks.

About Coconut Software

Coconut Software makes it effortless for customers to connect with their bank or credit union. Our appointment scheduling, queue management, and video banking solutions are used by leading financial institutions across North America, including RBC, Arvest Bank, Vancity, and Rogue Credit Union. Organizations that use Coconut benefit from a seamless customer experience that improves NPS, reduces wait times, and increases conversion rates.

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SCHEDULE A CONSULTATION