

Built secure-by-design for regulated financial institutions.

Valusync is a modular guidance toolkit delivered as a single branded iframe embed. This brief covers the integration model, data handling practices, and compliance posture for your IT and security review. A Data Processing Agreement and full technical documentation are available on request.

HOW THE INTEGRATION WORKS

Single iframe embed

The entire Valusync experience is delivered as one HTML iframe element. Your team places it on any member- or customer-facing web property that supports standard HTML. No native app development required.

2-4 hrs total IT lift

CSP & domain configuration

Add the Valusync domain to your Content Security Policy allowlist. Valusync provides the exact CSP directives needed and validates the configuration in the staging environment before any live deployment.

Validated in Phase 2

Institution-controlled data integration

Valusync holds no credentials to your core systems and initiates no inbound connections. Via optional API endpoints, your team can pre-populate member data from KYC and backend systems, and push engagement data out to your CRM and other platforms. All flows are institution-initiated and institution-controlled.

No Valusync-initiated access

DATA FLOW & WHAT WE HANDLE

WHAT WE COLLECT

Self-reported financial profile inputs

Members and customers voluntarily enter financial information (income, savings, goals) to receive personalized guidance. No data is pulled from your core banking system. No account numbers, no transaction history, no credentials.

HOW IT'S PROTECTED

AES-256-GCM encryption at rest

All PII is encrypted at rest using AES-256-GCM with institution-scoped keys. Data is transmitted over TLS 1.3. PII is anonymized before any processing — no personal data is sent to third-party AI models.

AUDIT & LOGGING

Immutable, tamper-evident audit logs

Every data access and system action is written to an immutable audit log, scoped per tenant. Logs are available to your compliance team on request and are structured to support GLBA, NCUA, and FDIC examination requirements.

RETENTION & DELETION

Configurable TTL & right-to-delete support

Session data is held for the configurable retention period agreed in the Data Processing Agreement. Member deletion requests are honored within the agreed SLA. No data is shared with other institutions — all storage is tenant-scoped.

COMPLIANCE POSTURE

SOC 2 TYPE I

In progress via Thoropass. Evidence available on request.

GLBA

Safeguards Rule aligned. DPA addresses all required provisions.

NIST CSF

Controls mapped to Identify, Protect, Detect, Respond, Recover.

NCUA

Aligned to supervisory guidance on third-party technology vendors.

FDIC

Aligned to third-party risk guidance for community and regional banks.

WHAT YOUR IT TEAM DOES

- 1

Receive embed snippet & CSP directives

Valusync provides the iframe HTML snippet and the exact Content Security Policy directives to add to your web property. No configuration decisions are left to your team.

PHASE 1 — WEEK 1

- 2

Legal sign-off on the Data Processing Agreement

One legal or compliance contact reviews and signs the DPA. Valusync provides a standard template aligned to GLBA and your regulatory framework. Typically completed in 1–2 weeks.

PHASE 2 — WEEKS 2–3

- 3

Place & test the embed in staging

Your IT contact places the iframe on your staging environment. Valusync validates the CSP configuration, rendering, and domain allowlisting together. Typical effort: 2–4 hours total.

PHASE 3 — WEEKS 3–4

- 4

Go live with compliance sign-off

No live deployment proceeds without both the DPA signed and the staging embed validated. Your compliance team receives a readiness checklist before the Phase 4 go-live date.

PHASE 4 — DAY 1

SECURITY CONTROLS

<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;">□</div> <div> <p>Encryption at rest & in transit</p> <p>AES-256-GCM for all PII at rest. TLS 1.3 for all data in transit. Institution-scoped encryption keys.</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;">□</div> <div> <p>Authentication & access control</p> <p>Firebase Auth with MFA enforcement. Role-based access control (RBAC) via Firestore Security Rules. No shared credentials.</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;">□</div> <div> <p>Immutable audit logging</p> <p>Every data access and system action logged with correlation IDs. Tenant-scoped, tamper-evident. Available for examination on request.</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;">□</div> <div> <p>Input sanitization & rate limiting</p> <p>All user inputs sanitized server-side. Per-session and per-tenant rate limiting with 429 throttling. Helmet middleware, CORS allowlisting enforced.</p> </div> </div>
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;">□</div> <div> <p>Dependency & vulnerability scanning</p> <p>Automated dependency auditing via GitHub Dependabot. Static analysis and 22-point security scan suite run on every deployment.</p> </div> </div>	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;">☀️</div> <div> <p>Infrastructure & uptime</p> <p>Hosted on Google Cloud Platform. Firebase Functions with per-function autoscaling. GCP Cloud Monitoring with alert policies. 99.5%+ uptime target.</p> </div> </div>

SHARED RESPONSIBILITY MODEL

<p>VALUSYNC HANDLES</p> <ul style="list-style-type: none"> ✓ Platform security, patching & uptime 	<p>YOUR INSTITUTION HANDLES</p> <ul style="list-style-type: none"> ✓ iframe placement on your web property
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RECOGNIZED BY



READY FOR YOUR SECURITY REVIEW?

Request the DPA, technical docs, and compliance artifacts.

We provide a full documentation package for your IT and risk teams — including the Data Processing Agreement, CSP directives, security architecture overview, and SOC 2 evidence artifacts in progress.

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Schedule a Technical Review