Wealth Write.Up Earns SOC 2 Type II Certification, Boosting Security for Canadian Investment Accounting Firms

Wealth Write.Up Security and Compliance Meets Rigorous Auditor Verified Standards

MONTREAL, QUEBEC, CANADA, July 30, 2026 /EINPresswire.com/ -- Wealth Write.Up has successfully completed its SOC 2 Type II certification, further strengthening data security and operational transparency for Canadian wealth management professionals and accountants managing extremely sensitive financial data.

> Achieving SOC 2 Type II certification is a significant milestone for Wealth Write.Up"
>
> *Brian McGlynn, CEO of Wealth Write.Up*

A pioneer in complex securities portfolio accounting for over 27 years, Wealth Write.Up streamlines complex investment accounting for professional services firms, family offices, foundations, and corporations. The AI-Powered platform supports multi-custodian and multi-currency transactions while delivering accurate financial reporting,audit-ready records, and enhanced client insights.

"Achieving SOC 2 Type II certification is a significant milestone for Wealth Write.Up," said Brian McGlynn, CEO of Wealth Write.Up. "While SOC 2 Type I validated our security architecture, Type II demonstrates to an independent auditor that our controls operated effectively over an extended review period. For our clients managing complex, high-value investment data, this reinforces confidence in the security, reliability, and
compliance of our product."

To protect the high-value financial data and tax-sensitive reporting managed by its clients, Wealth Write.Up maintains strict data security and data sovereignty controls. All client data is hosted exclusively within Canada in accordance with applicable Canadian privacy laws and regulatory requirements.

SOC 2 is an independent audit framework developed by the American Institute of Certified Public Accountants (AICPA). Wealth Write.Up's SOC 2 Type II examination assessed the operating effectiveness of its internal controls over a defined review period of 6–12 months, evaluating how effectively client data is protected against unauthorized access, misuse, and operational risk. This certification reinforces Wealth Write.Up's commitment to maintaining strong security practices and operational discipline. For firms operating in highly regulated industries, it demonstrates a sustained focus on protecting client information while supporting efficient and reliable investment accounting operations.


Headshot of Wealth Write.Up CEO, Brian McGlynn

About Wealth Write.Up
Wealth Write.Up is a complex investment accounting platform designed for Canadian-based professional services firms, family offices, corporations, and investment firms. For over 27 years, the solution has helped organizations simplify securities portfolios accounting, supporting multi-custodian and multi-currency transactions, while delivering precise financial reporting and actionable insights. Trusted by 250 + organizations and used by 1,800 + professionals, Wealth Write.Up offers cloud-based access with data hosted in Canada. Learn more at www.wealthwriteup.com

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