



SUPPLEMENTAL RESOURCE LIBRARY

IRS & NIST PUBLICATIONS

- IRS Publication 4557 - [Safeguarding Taxpayer Data](#)
- IRS Publication 5708 - [Creating a Written Information Security Plan for Your Tax Accounting Practice](#)
- IRS Publication 5433 - [Security Six Protecting Tax Data at Home and at Work](#)
- IRS Publication 1345 - [Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns](#)
- IRS Publication 5293 - [Data Security Resource Guide for Tax Pros](#)
- IRS Publication 1075 - [Tax Info Security Guidelines for Federal, State and Local Agencies](#)
- NIST Publication 7621 - [Small Business Information Security: The Fundamentals](#)

FTC SAFEGUARDS

- FTC Data Breach - [Response Guide](#)
- FTC Safeguards Rule - [Standards for Safeguarding Customer Information \(2023\)](#).
- FTC Safeguards Rule - [Standards for Safeguarding Customer Information \(2021\)](#).



SUPPLEMENTAL RESOURCE LIBRARY

SAMPLE POLICIES

- [Sample Policy - Client Communication Policy](#)
- [Sample Policy - Securing Customer and Firm Data Policy](#)
- [Sample Policy - Telecommuting \(or Work from Home\) Policy](#)
- [Sample Policy - Password Policy](#)
- [Sample Policy - Non-Disclosure Agreement](#)
- [Sample Policy - Written Warning for Employee](#)

GUIDES

- [How to Monitor EFIN and PTIN Volume](#)
- [How to Spot Data Theft](#)
- [How to Conduct a Background Check on an Employee or Candidate](#)
- [How to Choose a Qualified Provider](#)
- [How to Get Clients on Board with Security Best Practices](#)
- [What to do if You've Had a Breach](#)

CHECKLISTS & MORE

- [The 8-Step Employee Termination Checklist](#)
- [McGowanPRO's Cybersecurity Checklist](#)
- [Kaseya's 10 Tips for Improving IT Security Checklist](#)
- [Top 10 Tips to Improve Cybersecurity](#)
- [Data Security Policy Infographic](#)
- [PPT Deck - Security Awareness Training for Firms](#)



WHAT TO DO IF YOU'VE HAD A BREACH

DOWNLOADABLES

- [What to Do if You've Had a Breach](#)
- [iApp U.S. State Data Breach Notification Chart](#)
- [Sample Attachment C - Security Breach Procedures and Notifications](#)