

Your Guide to Creating a Data Security Plan

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Your Guide to Creating a Data Security Plan

The IRS “reminds tax preparers that protecting taxpayer information isn’t just good for clients & good for business – it’s also the law.”

The [FTC \(Federal Trade Commission\)](#) has provided guidance that tax preparers, much like other financial institutions, are required to create & update data security plans. Unfamiliar with data security plans? Essentially these are written protocols that you put in place for your business, to protect your clients from identity theft &/or data theft. Because tax professionals inevitably house sensitive information within their practice, it is imperative that the necessary plans are in place, should you have to face worst-case scenarios.

Before you begin creating a Data Security Plan, we recommend looking at [this article](#) from the IRS, as well as their guide to [safeguarding taxpayer data](#). In both links, you will find additional information on creating/implementing your plans...

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Now that you understand what a Data Security Plan entails & have read through the additional information/regulations we provided from the IRS, it is your turn to create plans for your practice.

In the downloadable guide below, you will find example outlines to reference along the way. Please keep in mind that information provided in this eBook is general in nature, may not apply to your practice’s circumstance(s) & should not be construed as legal advice. Please refer to the IRS or consult your attorney for guidance.

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