



Practical Guide to Writing YOUR Data Security Plan (1 CPE)

July 27, 2021

4:00 PM to 4:50 PM PT

COURSE DESCRIPTION

The key factors of IRS Pub 4557 SAFEGUARDING TAXPAYER DATA (encryption; network security; 2-Factor Authentication; backup strategies; spot data theft; utilize secure portals to safely exchange data with clients; etc.) are reviewed.

This information is then incorporated into the templates so that any tax professional can create a tailored Data Security Plan in about 2 hours.

Learning Objectives:

Understand the key points of IRS Pub 4557 – SAFEGUARDING TAXPAYER DATA – and make them part of their data security plan.

- ✓ Present data protection and backup strategies.
- ✓ Discuss how to utilize secure portals to safely exchange data with clients.
- ✓ Demonstrate how to verify disk drives are healthy and in good working order from the keyboard.
- ✓ Assist our clients by making them aware of credit monitoring (Fraud Alerts, credit freezes) as well as explaining to our clients how to “lock” their tax returns using the IRS IP PIN Program. Dependents can be “locked” to a return to prevent others from claiming their tax benefits.



Bill Nemeth, EA

Bill Nemeth, EA, has over 17 years as an enrolled agent and over 30 years as a tax professional. Bill's specialty is working with troubled taxpayers, assisting them with representation issues, such as audits, serial non-filers and helping taxpayers petition the US Tax Court.