



Learning Objectives

- Identify the importance of information security for CPAs and Tax Practitioners.
- Define the term “identify theft” and recognize how identify theft most commonly occurs.
- Recognize why CPAs and Tax Professionals are being targeted by cybercriminals
- Recognize the importance of encrypting client data.
- Identify the importance of creating internal controls and a security plan to protect client data.
- Recognize the actions that must be taken in the event of a breach of sensitive client identity data.

Topics Covered

Part 1:

- Information Security
- Internet
- Information Security Tools and Processes
- Security Concepts
- People Accessing Information
- Information Security Risk Management
- Risk Control
- Unsecured Computers and Networks
- Identify Theft
- CPAs and Tax Practitioners Are Being Targeted
- Six Basic Safeguards

Part 2:

- Phishing
- Phishing Tools
- Phishing Mitigations
- Phishing Solutions
- Prevent Phishing Attacks
- Complying with the Safeguards Rule
- Creating an Information Security Risk Management Plan