

Tax Season Cybersecurity Checklist for CPAs

7 quick protections to reduce phishing, portal breaches, and ransomware.



1 MFA Everywhere

Email, portal, remote access



2 Email Phishing Protection

Link/attachment filtering & spoofing protection



3 Secure Client Document Upload

Portal rules: no SSNs via email/text



4 Endpoint Protection + Updates

EDR + patching



5 Backups You've Tested

Restore test before deadlines



6 5-Min Weekly Staff Reminders

Busy-season phishing cues



7 Incident Plan Ready

Who to call + steps to isolate

Need help locking this down before deadlines?



(954) 289-6685

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