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Tax Professionals: Protect Your Clients; Protect Yourself

IRS Protect Your Clients; Protect Yourself Tax Tip Number 1, December 7, 2016

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Due to the sensitive client data held by tax professionals, cybercriminals increasingly target the tax preparation community. Thieves use a variety of tactics, from remote computer takeovers to phishing scams.

The IRS, state tax agencies and the private-sector tax industry ask for your help to combat identity theft and fraudulent returns. Working in partnership with you, we can make a difference. That's why we launched a public awareness campaign that we call, "Protect Your Clients; Protect Yourself."

Identity thieves are a formidable enemy. Data breaches are increasing in number and scope. Thieves often use the stolen identity information to file tax returns. As a tax preparer, you play a critical role in protecting taxpayer data.

Most tax professional's software includes security protections. You should take other defensive moves as well.

Here are a few critical steps:

- **Secure Data.** Make sure that taxpayer data, including data left on hardware and media, is never left unsecured; use security software on all digital devices.
- **Shred Documents and Destroy Media.** Securely dispose of taxpayer information.
- **Use Strong Passwords.** Require strong passwords (numbers, symbols, upper and lowercase) on all computers, tax software programs and Wi-Fi.
- **Change Passwords.** Require periodic password changes every 60 – 90 days.
- **Safely Store Data.** Store taxpayer data in secure systems and encrypt information when transmitting across networks.
- **Encrypt Email.** Encrypt e-mail that contains taxpayer data.

See [Fact Sheet 2016-23](#) for additional tips.

Also, learn to recognize phishing attempts that mimic tax software providers or the IRS. A number of current scams pose as IRS e-services or other entities to trick you into clicking on malicious links or downloading malicious attachments. These phishing scams may attempt to steal your usernames and passwords for critical accounts. Or, they may secretly install software that will track your every key stroke.

The IRS and its partners have issued numerous alerts and warnings to the tax professional community this year on emerging phishing scams specifically targeting you and your colleagues.

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When in doubt about any communication purporting to be from the IRS or a tax software provider, go to their main web page instead of clicking on any links.

This is one in a series of special security awareness tax tips for tax professionals. The "[Protect Your Clients; Protect Yourself](#)" campaign's goal is to raise awareness among tax professionals. It is an initiative of the Security Summit, a joint project by the IRS, states and the tax community to combat identity theft. Because of the sensitive client data held by tax professionals, cybercriminals increasingly are targeting the tax preparation community.

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