Table of Contents

Operating Systems 1

5 Key Functions of Operating Systems 1

6 Major Operating Systems 2

Security Risks 3

Copilot 5

Adobe AI 6

Internet Browsers 7

Mozilla Firefox 7

Microsoft Edge 8

Google Chrome 9

Apple Safari 10

Opera 11

Search Engines 12

Google Privacy Concerns 13

Bing Privacy Concerns 13

Duck Duck Go Privacy Concerns 14

Yahoo Privacy Concerns 14

Baidu Security Concerns 14

Addressing Google Privacy Issues 15

E-Mail Systems 16

SecureMyEmail 16

Insecure email providers 20

7 Simple Steps to a more secure office E-Mail system 21

Artificial Intelligence or AI 22

ChatGPT and CoPilot and other public AI 23

Blackberry 23

Taxspeaker Research Assistant 25

Written Information Security Plan 27

Introduction 27

7 Requirements of a WISP 28

Parties that must be notified 29

Latest IRS Stakeholder Liaison List (at manual date) 29

Developing a WISP 30

Maintaining a WISP 30

Aspects of a WISP 30

Plan Template 30

Written Information Security Plan Example 31

OBJECTIVES 32

PURPOSE 32

SCOPE 32

IDENTIFIED RESPONSIBLE OFFICIALS 33

Internal Firm Risk Mitigation 34

PII Disclosure Policy 36

Reportable Event Policy 37

External Firm Risk Mitigation 38

WISP-Appendix 43

Hardware Inventory 43

Software with PII Inventory 45

Security Breach Procedures 47

3rd Party Service Provider Acknowledgement 49

Records Retention Policy 51

Remote Access and Off Premises Work Policy 53

Computer and Internet Use Policy 57

PII Disclosure Policy 63

PII Disclosure Policy 2 67

Home/Home Office Security 69

Recommendations for device security 69

Upgrade to a modern operating system and keep it up-to-date 69

Secure routing devices and keep them up-to-date 69

Employ firewall capabilities 70

Leverage security software 70

Protect passwords 70

Limit use of the administrator account 70

Safeguard against eavesdropping 71

Backup 71

Internet 71

Take precautions on social networking and public sites 72

Security-Day to Day Operations 73

Identifying the Risks 73

What are the threats? 73

What Needs to be Protected? 74

STEP #1 OBTAIN CYBER-LIABILITY INSURANCE POLICY 74

The IRS 76

Software and Application Security 79

Protection of Electronic Data 80

The Difference between Anti-Virus and Security Suite Software 80

Security Suite Software Recommendations 80

Hard Drive Encryption 82

Password Protection and Sharing 83

Multi-Factor Authentication 87

Password Protecting individual Adobe/Word/Excel files 89

Windows Logins and Users 89

Firewalls 92

Virtual Private Networks 97

Protecting People and Physical Assets 100

2025 Security Checklist 101

Point 1 Locked Exterior & Interior Access Doors with audible notification 105

Point 2 Secure Exterior Lockbox for Drop-Off 108

Point 3 Highly Visible Fire Extinguishers 108

Point 4 Up to Date First Aid Kits 109

Point 5 High Power LED Flashlights 109

Point 6 Maintain Exit Signs and keep exits free and clear of obstruction 110

Point 7 Air Horn for front line employees 110

Point 8 Emergency calling list 111

Point 9 Establish secure safe assembly area or notification system 112

Physical Asset Security 113

Disaster Planning Checklist 117

Mobile Security 118

Comment on Telecommuting Employees 119

Wireless Systems 123

DATA PROTECTION & CONFIDENTIALITY 126

5 Basic Backup Rules 126

IDENTITY THEFT 128

Avoiding Identity Theft-Businesses 130

Avoiding Identity Theft-Individuals 131