

TAX SEASON SURVIVAL CHECKLIST

Is your firm actually ready for the February surge?

Page 1: The Chaos Factor

The Problem: High pressure + seasonal staff = security disaster.

CardinalsByte Expert Insight

We see it every year. Firms add temporary staff, skip the security training because of "time," and leave the digital back door wide open. In the rush to file, security is often the first casualty.

The Stakes

A single data leak doesn't just result in IRS fines; it ends client trust forever. When your team is working 14-hour days, the ability to spot a phishing attempt drops by 60%.

[GRAPHIC: SAFETY METER]

Moving from Red (High Risk) to White (Secured)



Page 2: The Tactical Checklist

□ The 5-Minute Morning Audit

Daily checks for unusual login locations or IP addresses. Verify that no new "Global Admin" accounts were created overnight.

□ The "Clean Desk" Digital Policy

Strictly ban the sending of SSNs or full bank numbers via unencrypted email. If it's not in the portal, it shouldn't be in the cloud.

□ The De-provisioning Protocol

Pre-schedule the "Kill Date" for every seasonal staff account. Don't wait until May to revoke access that should have ended in April.

Expert Tip

Access should be "Least Privilege": If a staff member doesn't need the firm's master ledger to perform their specific task, do not give them the key. Segment your data.

CardinalsByte

Cybersecurity Compliance & Risk for:
Small Business, CPAs, Tax Professionals, Bookkeepers and Accountants

www.cardinalsbytes.com