

What Does Summit Tax Solutions Do To Protect My Sensitive Personal Information?

Clients entrust their tax-return preparers with significant amounts of confidential information necessary to prepare their tax returns. This naturally raises the question, what is my tax practitioner doing to adequately safeguard my confidential information?

At Summit, we treat your personal information as if it were our own. As such, we have taken the following defensive precautions to help protect your information:

- We stay informed of the numerous alerts and warning issued by IRS;
- We have learned to recognize phishing attempts that mimic tax software providers and IRS;
- We are familiar with various security protections inherent in our professional tax-preparation software;
- We monitor our Efile Identification Number (EFIN) with IRS e-Services and our software provider;
- We protect all data by making sure it not left unsecured and use multiple commercially available security software on all digital devices;
- We store data in remote systems and encrypt information when transmitting;
- We archive all paper records in locked file cabinets that are housed in a separate and secure document room,
- We regularly conduct full-system security scans to search for viruses and malware on our computers;
- We regularly back-up mission-critical and client files;
- We do not employ wireless communication within our office;
- We power-down our computers or disconnect them from the internet when not in use for extended periods, such as at day's end;
- We use and change regularly strong passwords on our tax software;
- We use only service providers who have policies in place to maintain an adequate level of information protection;
- We have designed and implemented a 'multi-layer' email architecture that is difficult to breach;
- We subscribe to a secure email service that provides encryption technologies;
- We maintain cyber-theft liability insurance;
- We do not provide clients copies of tax returns that contain sensitive personal information, unless requested to do so;
- We securely dispose of all taxpayer information when necessary;

- We obtain annual certification of PCI compliance to ensure credit-card information is handled safely and in accordance with industry standards;
- We have developed a plan to follow should we experience a data breach; and
- We provide unparalleled support should our clients experience tax-related identity theft.