



Practice Advancement Program

Data Security Strategies

Course Description

Accountants that handle sensitive client data are often the target of cybercrimes. This increased risk is supported by evolving regulatory actions including the IRS 4557 guidelines, cyber security mandates, and the state-based introduction of safe harbor laws. Understand the risks and learn how to be secure and compliant in today's cloud-based environment.

Course Syllabus

Section One – The 8 Cyber Threats Your Firm Needs Should Know About

Session 1:

- Phishing
- Ransomware
- Insecure Connections
- Passwords
- Human Error
- Employee Theft
- Infected Devices
- Remote Working

Section Two – The Tech Your Firm Needs To De-Risk, Survive, and Thrive

Session 2:

- The 3 pillars of security: Tech, Team, and Compliance
- Case studies
- Tech solutions

Section Three – Training & Compliance: How To Manage The Human Risk

Session 3:

- What does the compliance landscape look like today?
- Case study of a breach
- Cyber insurance explained
- Training and compliance for your Firm

Section Four – Practical Tips To Secure Your Firm: Demo of Practice Protect

Session 4:

- Q&A