

Assoc. of
Professional
Accounting &
Tax Consultants.
Member since 1990



Simply FINANCIALS
Diana Read-Miedema
20 Willow St, Truro, Nova Scotia, CA. B2N 4Z4
Tel: 902-895-6074 Fax: 902-895-3038
www.SimplyFinancials.com



DATA: SECURITY, PRIVACY, DISASTER RECOVERY

Diana's proactive list of 18 measures implemented in her office

Special thanks to the speakers, sponsors, and exhibitors at NASBA.ca conferences who covered privacy/PIPEDA, commercial fraud, identity theft, and email sabotage. (Agendas/Bios on Coaching pg www.simplyfinancials.com)
First published March 25, 2011, just before Epsilon's data breach March 30 of Rewards lists of many Fortune 500 companies.

1	Data1 online backup	DAILY: Primary data virtually backed up with Cdn state-of-the-art Abaxio at PEER1
2	System backup	WEEKLY: backup System + System Imaging onto an external HD. Repair Disk on DVD
3	Data2 ext HD backup	WEEKLY: Secondary docs locally backed up onto ext HD using www.AVCBACKUP.ca
4	Safety Deposit Box	Fire & melt-proof way to store hard drives, flash drives, Repair Disk CDs in SDB at bank
5	Locked cabinets/rms	All client files are out of sight and stored in locked steel filing cabinets in locked rooms.
6	PCI Compliance	Credit Card details of clients are not stored anywhere in my office or on my computer. Using secure SAGE EXCHANGE where payments are sent virtually to Chase Bank
7	Encrypted emails	www.e-courier.ca for tax season emails. NASBA#4 Platinum Sponsor January 2010.
8	24/7 UPS Backup	UPS gives me one hour after an electrical outage to store and shut down.
9	HQ power bars	High quality power bars (not Dollarama!) used for all my office and classroom equipment.
10	Internet History	Internet History Cache emptied every two days.
11	Dont save password	I do not save my username and password in banking/business or social media websites
12	Non public Fax	Sending: I require a client to stand beside their fax machine before I send my fax. Receiving: My fax is in a locked filing storage room so no one can see any fax coming in.
13	Insurance	Errors & Liability Insurance. (AP&ATC members write tax & accounting exams)
14	No wireless	No cordless phone, cell phone, or wireless internet is used for business purposes.
15	By Appt. Only	"By Appointment Only" keeps conversations personal and confidential.
16	HQ Shredder	CROSS-CUT paper shredder used. Shreds are placed in dark non see-through bags.
17	Confidentiality	I have designed TWO CONFIDENTIALITY LETTERS: A. I sign a letter which gives assurance to new clients when doing onsite support. B. Signed by persons who have been in my office to give tech support or mailout help
18	PIPEDA Letter signed by tax clients	Sample: "Starting January 2004, the federal PIPEDA Act (Personal Information Protection & Electronic Documents Act) applies to most organizations in Canada including us. This legislation controls how organizations collect, store, use and disclose personal information, so that we may provide you with secure services. We, at Simply Financials®, have established physical and computer systems safeguards and proper processes to protect client info from unauthorized access or use.