

Protect Your Clients; Protect Yourself

A Security Summit campaign to increase
awareness among tax professionals



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It CAN Happen to You

- The risk is real; payroll providers are prime targets for identity thieves
- Cybercriminal tactics constantly evolve
- Data loss can occur so many ways:
 - Burglar steals office computers
 - Cybercriminal breaches your systems using phishing and malware schemes
 - Disgruntled employees steals client info
 - Dispose of old devices without erasing data

Data Theft Tactics

- Phishing emails, text or calls
 - Pose as trusted organizations
 - Embed links to fake websites
 - Use malware-infected attachments
- Risks of opening phishing scams
 - Account take-overs (Banks, IRS e-Services, Tax Software)
 - Computer breaches
- Educate employees on scams/risks

Emerging Scams

- Phishing emails posing as IRS e-Services
- Phishing emails posing as new clients
- **Spoofting emails to payroll personnel requesting all employee Forms W-2**
- Remote takeover of tax preparer computers
- Variations constantly emerge
- Know your clients; know your employees

W-2 Scam

- Form W-2/SSN Data Theft: Information for Businesses and Payroll Services Providers
- Email dataloss@irs.gov to notify the IRS of a W-2 data loss
- To report receiving the W-2 phishing email:
- Email to phishing@irs.gov.

Steps to Protect Client Data

- Read Publication 4557, Safeguarding Taxpayer Data
- Review current security measures
- Create a security plan
 - Use top-notch software security
 - Educate all employees
 - Use strong passwords
 - Secure Wi-Fi
 - Encrypt PII emails
 - Backup files

Plan Ahead for Data Loss

- Create a reaction plan for data theft
 - Call IRS Stakeholder Liaison (found on IRS.gov)
 - Notify your State Tax Agency
- Review Federal Trade Commission’s “Business Center” to assist businesses with data losses
 - Notify police
 - Notify businesses



IRS—Notify clients

W – 4 Withholding

- “Paycheck Checkup” campaign.
- Employers and payroll service providers were encouraged to implement the changes in February.
- Withholding/W-4 Outreach Products
- IRS.gov Tax Withholding Landing Page:
- <https://www.irs.gov/payments/tax-withholding>

W – 4 Withholding

- [Paycheck Checkup Resources @ Your Fingertips](#)
- [Frequently Asked Questions:](#)
- www.irs.gov
 - Withholding Calculator
 - Withholding Tables

Contact Information

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