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**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](http://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](http://www.simplyfinancials.com))  
First published March 25, 2011, just before Epsilon's data breach March 30 of Rewards lists of many Fortune 500 companies.

<b>1</b>	<b>Data1 online backup</b>	DAILY: Primary data virtually backed up with Cdn state-of-the-art Abaxio at PEER1
<b>2</b>	<b>System backup</b>	WEEKLY: backup System + System Imaging onto an external HD. Repair Disk on DVD
<b>3</b>	<b>Data2 ext HD backup</b>	WEEKLY: Secondary docs locally backed up onto ext HD using <a href="http://www.AVCBACKUP.ca">www.AVCBACKUP.ca</a>
<b>4</b>	<b>Safety Deposit Box</b>	Fire & melt-proof way to store hard drives, flash drives, Repair Disk CDs in SDB at bank
<b>5</b>	<b>Locked cabinets/rms</b>	All client files are out of sight and stored in locked steel filing cabinets in locked rooms.
<b>6</b>	<b>PCI Compliance</b>	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
<b>7</b>	<b>Encrypted emails</b>	<a href="http://www.e-courier.ca">www.e-courier.ca</a> for tax season emails. NASBA#4 Platinum Sponsor January 2010.
<b>8</b>	<b>24/7 UPS Backup</b>	UPS gives me one hour after an electrical outage to store and shut down.
<b>9</b>	<b>HQ power bars</b>	High quality power bars (not Dollarama!) used for all my office and classroom equipment.
<b>10</b>	<b>Internet History</b>	Internet History Cache emptied every two days.
<b>11</b>	<b>Dont save password</b>	I do not save my username and password in banking/business or social media websites
<b>12</b>	<b>Non public Fax</b>	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.
<b>13</b>	<b>Insurance</b>	Errors & Liability Insurance. (AP&ATC members write tax & accounting exams)
<b>14</b>	<b>No wireless</b>	No cordless phone, cell phone, or wireless internet is used for business purposes.
<b>15</b>	<b>By Appt. Only</b>	"By Appointment Only" keeps conversations personal and confidential.
<b>16</b>	<b>HQ Shredder</b>	CROSS-CUT paper shredder used. Shreds are placed in dark non see-through bags.
<b>17</b>	<b>Confidentiality</b>	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
<b>18</b>	<b>PIPEDA Letter signed by tax clients</b>	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.