

Tax Season Cybersecurity Checklist

Secure Accounts & Access

- Enable multi-factor authentication (MFA) on tax software, email, banking, payroll and investment accounts
- Use strong, unique passwords for every account
- Review and remove unused or inactive user accounts

Protect Devices & Networks

- Install all operating system, browser, and application updates
- Ensure antivirus and endpoint protection are active and up to date
- Avoid using public Wi-Fi for tax-related activity
- Use a secure, reliable internet connection when accessing financial or tax information

Handle Email, Links & Attachments Safely

- Be cautious with links in emails, even from legitimate senders
- When possible, navigate directly to financial or tax websites instead of clicking email links
- Avoid opening unexpected attachments containing sensitive information
- Watch for urgency, threats, or unusual requests for personal data

Secure Physical Mail & Paper Documents

- Retrieve tax-related mail promptly
- Store financial and tax documents in a secure location
- Avoid leaving sensitive paperwork unattended on desks, printers, or shared spaces
- Shred documents containing personal or financial information before disposal

Safeguard & Back Up Sensitive Data

- Use secure online portals or paperless delivery options when available
- Limit how long sensitive files are stored on devices or in email inboxes
- Back up tax documents and financial records regularly
- Ensure backups are protected from ransomware and unauthorized access

Reduce Risk Through Timing & Awareness

- Consider filing taxes early to reduce the risk of fraudulent filings
- Allow extra time to review communications carefully and avoid rushed decisions
- Monitor accounts for unusual or suspicious activity throughout tax season

Additional Steps for Businesses

- Remind employees to stay alert for tax-related phishing attempts
- Secure payroll, accounting, and HR systems
- Monitor systems for unusual logins or file access
- Review cybersecurity policies before peak tax activity

