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IRS's WISP serves as 'great starting point' for tax firms ahead of 2023 tax season

NATP advises preparers build on IRS's template to suit their office's needs

APPLETON, Wis. (Aug. 14, 2022) – After years of requests from tax preparers, the IRS, in conjunction with the Security Summit, released its written information security plan (WISP) template for tax professionals to use in their firms.

While this is welcome news, the [National Association of Tax Professionals](#) (NATP) advises tax office owners to view the template only as a starting point. Firms should review and revise their plan at least annually.

“It’s a great starting point; you can literally fill in the blanks, and in a matter of time, you’ll have a completed document,” said NATP’s IRS liaison, Larry Gray. Gray served as the only tax association representative among several software companies on the Security Summit that helped write the IRS’s WISP template. “People should not take it as the end-all, be-all, though. Preparers need to systematically review this and regularly look at their biggest risk assessments, which, in most cases, are their employees, or, if they’re a one-person firm, themselves.”

Gray advised preparers to look at the IRS’s WISP in its entirety. Although not all parts may apply to each firm, owners should know the opportunities to expand their data security procedures. For example, data security protocols should be reviewed and revised if a firm offers employees to work remotely or goes from a one-person office to a two-person office.

“In today’s world, the security of your client’s information is just as critical as doing the tax return correctly,” Gray said. “There’s no reason now that any practitioner can say, ‘I don’t have a WISP.’ But now the question becomes ‘What am I doing with it?’”

NATP [offers training](#) for tax professionals to learn how to adapt the IRS’s WISP template to meet their own office’s specific needs and to ensure compliance is achieved annually. For more information on NATP, or to speak with an expert about tax office data security or data security plans, contact [Nancy Kasten](#) or [Samantha Strong](#).

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About NATP: The National Association of Tax Professionals (NATP) is the largest association dedicated to equipping tax professionals with the resources, connections and education they need to provide the highest level of service to their clients. 23,000 members rely on NATP to deliver professional connections, content expertise and advocacy that provides them with the



support they need to best serve their clients. The NATP headquarters is located in Appleton, WI. To learn more, visit www.natptax.com.

