

The Accounting Firm Technology Health Checklist



ATLANTIC COMPUTER SERVICES

Is Your IT Supporting Your Busy Season — or Slowing You Down?

As a CPA, you live in a world of deadlines, confidentiality, and compliance. During tax season or audits, the last thing you need is a system crash or a client data breach. This checklist will help you identify where your tech may be leaving you vulnerable — and how the right IT strategy can keep you secure and efficient all year long.

1. Security & Protection

- Client tax and financial data is backed up, encrypted, and access-controlled.
- MFA is enabled for client portals, accounting software, and email.
- Staff complete cybersecurity training with phishing simulations.
- Laptops and mobile devices can be locked or wiped remotely.
- You have a documented breach response plan aligned with IRS and FTC standards.
- Security patches and antivirus software are automated.

Why it matters:

Data breaches can lead to IRS penalties, loss of clients, or worse. Your reputation — and compliance — are on the line.

2. Performance & Reliability

- Tax and accounting platforms run smoothly (e.g., QuickBooks, Thomson Reuters, Drake).
- There's minimal downtime or lag during peak deadlines.
- Devices are standardized and perform consistently across the firm.
- You keep an inventory of hardware and software lifecycle.
- Remote team members have secure, reliable access to systems.

Why it matters:

Deadlines don't wait. The right tech keeps your team productive and your clients happy.

3. Strategy & Growth

- Your IT roadmap supports future growth or acquisitions.
- Your IT provider understands accounting compliance like GLBA, IRS Pub 4557, and SOC 2.
- You meet regularly to review tech performance and updates.
- You resolve recurring tech issues with root-cause fixes.
- You have a proactive IT partner — not a reactive vendor.

You.Can't.Afford.Downtime.During.Tax.Season. When every deadline matters, your technology must perform flawlessly. Scan.the.QR.code.to.book.your.free.Discovery.Call and find out how to safeguard client data, eliminate bottlenecks, and stay audit-ready all year long. Let's.make.sure.your.IT.is.as.precise.as.your.numbers;

