

IRS Publication 4557 Assessment

Safeguarding Taxpayer Data Made Easier

Identity thieves are constantly learning and changing their tactics to create more sophisticated threats to access critical data. Due to the nature of the information you as a tax preparer store, you have become a target for data theft.

From members of major accounting firms to one-person storefronts, you are a potential victim; and safeguarding taxpayer data is not only crucial, but it is your legal responsibility.

You need an information security partner you can trust to help you navigate the guidelines of IRS Publication 4557.

Data Tax Preparers Must Protect

Taxpayer data is defined as any information obtained or used in the preparation of a tax return, such as income statements, meeting notes, recorded conversations, etc.

As a tax preparer, you must protect this type of personally identifiable information.

Government, businesses, organizations, and individuals that **receive, maintain, share, transmit or store** taxpayers' personal information are subject to Publication 4557 guidelines.

What is PII?

Personally Identifiable Information (PII) is *any* data used to identify a specific individual.

Examples of PII include the following:

- Name
- Address
- Phone number
- Date of birth
- Social Security number
- Driver's license number
- Mother's maiden name
- Spouse information

Who Needs our IRS Publication 4557 Services?

As an independent security consulting company, Sword & Shield is best equipped to help you protect your clients and protect yourselves by guiding you through the Publication 4557 checklist to fulfill your requirements. We assist the following types of organizations who must be compliant:

- E-file and Paper Return Preparers
- Reporting Agents
- Intermediate Service Providers
- Transmitters
- Electronic Return Originators
- Service Providers
- Software Developers
- Affiliates



About Us

Securing business for more than 20 years, Sword & Shield Enterprise Security, Inc. partners with our customers to meet the needs of their dynamic cybersecurity and compliance landscape.

We work closely with companies to become tightly integrated with their enterprise operations in the areas of managed security, risk and compliance, enterprise security consulting, security incident response and forensics, and security training.

Recognized nationally and headquartered in Knoxville, Tennessee, Sword & Shield has offices throughout the US. Sword & Shield services a broad spectrum of industries, including healthcare, retail, media, banking and finance, legal and manufacturing.

Just Ask

Sword & Shield has vast experience in virtually every area of information security and compliance. If you need a service in these areas not specifically named in a description, the chances are we do it, and we do it well. So, just ask.

Sword & Shield's IRS Publication 4557 Assessment

Sword & Shield partners with you to assess your ability to safeguard taxpayer data, and provides you with a road map to remediation pursuant to IRS Publication 4557.

Sword & Shield's information security and compliance expertise and full range of services qualify us to help your organization to understand and meet your responsibility to safeguard taxpayer information.

Let Sword & Shield help you to determine your data privacy and security needs, and implement safeguards to meet them.



Why Sword & Shield Enterprise Security

Technology firms that dabble in security tell you what you're doing wrong (or not doing at all) and walk away, leaving you without a plan of action. Sword & Shield partners with you to become an integral part of your cybersecurity and compliance program by not only identifying gaps and vulnerabilities, but also continuing to work with you to achieve and maintain a secure and compliant environment.

In short, Sword & Shield's depth and breadth of expertise in every aspect of our comprehensive portfolio of security services, coupled with our customer-first approach, empowers us to provide tailored solutions and personalized support for small to enterprise level companies. We strive to make your security and compliance initiatives as easy as possible on you.

This is what sets us apart from other information security and compliance firms.

Knoxville, Tennessee

1431 Centerpoint Boulevard
Suite 150
Knoxville, TN 37932
Phone: 800.810.1855

Nashville, Tennessee

131 Maple Row Boulevard
e500
Hendersonville, TN 37075
Phone: 615.928.1990

Portland, Oregon

1220 Main Street
Suite 400
Vancouver, WA 98660
Phone: 360.567.2587

Washington, DC

1655 N. Fort Myer Drive
Suite 700
Arlington, VA 22209
Phone: 703.382.6316