ACCOUNTANCY PRACTICE LAUNCH PROGRAMME · LOCK DOWN SECURITY FOR THE WHOLE STACK

Practice security checklist

The passwords, MFA, backups and breach-response steps that protect a practice holding client financial data.

01 Passwords and access

A unique, strong credential on every service, with no sharing and no reuse.

- [ ] Put every login in a password manager, so each service has its own strong password.
- [ ] Never reuse a password across HMRC, banking, accounting or email.
- [ ] Remove access promptly when someone leaves or a tool is retired.

02 Multi-factor authentication

MFA everywhere, and above all on the two accounts that unlock the rest.

- [ ] Turn on MFA for your HMRC agent services account: it is the master key to every client's tax record.
- [ ] Turn on MFA for your business email, since it can reset most of your other logins.
- [ ] Turn on MFA for banking and your accounting platform.
- [ ] Prefer an authenticator app over SMS codes where the service offers it.

03 Backups and devices

Assume a laptop will be lost or fail, and plan so it costs you nothing but the hardware.

- [ ] Encrypt every device that touches client data (BitLocker or FileVault).
- [ ] Back up anything not already in the cloud automatically, and check it restores.
- [ ] Lock screens on idle, and keep operating systems and software updated.

04 If the worst happens

Know the first moves before you need them. A breach of financial data can be an ICO matter.

- [ ] Contain it first: change the affected passwords and revoke active sessions.

PREFER THIS DONE FOR YOU?

Want your systems built secure and wired together from day one?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

Talk to us

- [ ] Write down what was accessed, when, and whose data was involved.
- [ ] Check the ICO's 72-hour reporting duty, and notify affected clients if required.
- [ ] Feed the incident back into your continuity plan from Module 2.

PREFER THIS DONE FOR YOU?

Want your systems built secure and wired together from day one?

It's one of the things we build — hand it over and skip the DIY. · digitalroyalty.co.uk

Talk to us