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If your office is like most, it's going mobile. From financial spreadsheets and payroll information to tax forms and client communications, many CPAs are accessing critical client data via their mobile devices. As a result, the risk of data leakage is becoming a heightened priority for the modern accounting firm.

The challenge of collaboration and file sharing is truly pervasive. From email to

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To protect your client data and your firm's reputation, consider these five steps for an enterprise-grade file sharing solution that will give you peace of mind:

**Step 1: Achieve Full Featured Mobile Access** – To be truly effective, you need to be able to not only download and read files on your device while mobile, but also easily share or make changes to documents. Choose a service that supports a variety of mobile device types, offers a simple yet secure way to share files with others, and has the ability to manipulate common documents such as Microsoft Office.

**Step 2: Get Redundant** – Mobile access implies anywhere anytime, so service availability is a critical component of vendor selection. To ensure optimum uptime, look for services that are backed by geo-redundant servers for increased performance and availability.

**Step 3: Be In Control** – A business-grade file sharing solution should provide administrative control over documents, users and devices. It should have the ability to define granular access policies based on user roles and document types, and also provide detailed tracking and reporting to support compliance auditing.

**Step 4: Secure the Data** – Financial data needs to be secure. Not only does it mean securing access, but also the data itself should be encrypted in-storage, in-transit and even in-application session. Furthermore, it is important that on-device access includes the ability to prevent unauthorized copy and download, and the ability to remotely wipe content in the event of loss or theft.

**Step 5: Have it Third Party Verified** – To ensure your service provider is living up to its operational business practices, choose one that has been through a thorough independent audit such as an SSAE 16 SOC2 Type 2 audit.

No matter where you work – in the office or on the road – protect your client’s data

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