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TECHNOLOGY

Webinar: Cybersecurity for the Tax Practitioner

Understand your legal and regulatory obligations and develop adequate policies to secure client data and protect your practice.

Aug. 15, 2023

The logo for Drake Software, featuring the word "Drake" in a dark grey sans-serif font and "Software" in a light blue sans-serif font, with a registered trademark symbol (®) to the upper right of the word "Software".

This webinar was held on Tuesday, September 12, 2023

Sponsor: Drake Software

Duration: 1 Hour

Understand your legal and regulatory obligations, develop adequate policies to secure client data and protect your practice. Jared Ballew, 2022-23 Chair of the ETAAC and Vice President of Government and Industry Relations at Taxwell; and Ann Campbell, CPA CIA and Drake Software Trainer will share an overview of the cyber threats that taxpayers and tax professionals face daily. Attendees will learn why cybercriminals target taxpayer data, their methods, and how to protect clients. Presenters will also address the WISP and how to apply IRS guidance in the individual tax preparer's office.

Program level: Basic (no prerequisites required).

Field of Study: Information Technology

Presented by



Jared Ballew is a 20-year veteran of the tax industry, and currently serves as Vice President of Government and Industry Relations at Taxwell, serving both Drake Software and TaxAct. Ballew is an expert in liaising and building relationships with Federal and State governments, industry and professional associations, and other partners. He is the 2022-23 Chairman of the IRS Electronic Tax Administration Advisory Committee and also serves as the President of the National Association of Computerized Tax Processors (NACTP), a trade association of the top income tax, payroll, and information reporting software companies who collaborate to promote standardization and simplification between government tax agencies and the tax processing industry. Jared is a popular speaker and advisor due to his expansive knowledge of current tax policies, cybersecurity, and industry trends.



Ann Campbell, CPA CIA, joined Drake Software in 2021 as a Tax Software Trainer. She is a Certified Public Accountant licensed to practice in California and North Carolina with many years of experience as a tax preparer using Drake Tax®. Ann has previously worked as a CFO and Controller in various industries, and she was one of four finalists for the Plastics News CFO of the Year 2019 award. Ann is a graduate of the Wharton School at the University of Pennsylvania.



Isaac M. O'Bannon is the managing editor and digital content manager for *CPA Practice Advisor* (www.CPAPracticeAdvisor.com), drawing on two decades of experience covering the areas of professional accounting, taxation, business productivity and consumer technologies. Prior to *CPA Practice Advisor*, Isaac was a consultant at firms in San Francisco, Denver and Tulsa, serving clients that included Logitech, Polycom, Hilti, Microsoft, the Stanford Research Institute, the University of Oklahoma's College of Engineering and other technology leaders. He is a U.S. Navy veteran.

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