

Security and Privacy Procedures

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Your security and privacy are very important to me. I want to outline the various policies and procedures which are implemented to protect your confidential information.

Building Security: My office is located in a single tenant structure and is locked at all times. Clients who do not send me documents through my secure portal or by Priority Mail meet me to discuss and exchange papers at an agreed-upon meeting place where conversation is not heard from others. Immediately after the meeting, documents are stored securely at the office until ready to return to the client.

Employees: There are no employees or others who handle client documents or returns.

Printers: I use a printer for all sensitive and tax document printing located in the office area. This happens seldom as all tax results are stored on the secure portal. This is not a wireless printer, so data transmitted cannot be compromised. I retrieve printouts immediately after printing. When closing an engagement with a client, I shred any superfluous documentation in the shredder located at my desk.

Paperless: I generally run a paperless work environment. Workflow management and document interaction is primarily electronic. My workstation is equipped with one or two monitors to allow for efficient use of electronic documents. It is very uncommon for tax documents to be printed which adds to my security and privacy initiatives.

Shredding: My shredder is located next to the printer and shredder. Documents needing shredding are shredded immediately.

File Storage: I store support documentation in Verifyle, which uses 250-bit encryption and is password protected.

File Servers: I use a backup drive to store copies of my tax data stored on the C:/drive.

Norton 360: I use Norton as my security provider. Antivirus, malware, ransomware, and hacking protection, cloud backup, password manager, browser protection, VPN internet, dark web monitor.

Incogni.com is great for scouring the cybersphere for malicious sites that hold your email address and removing it from them.

Content Control: I implement Norton Security for my firewall device with content monitoring. All inbound internet traffic is compared to allowed content and most of it is disallowed. I use NordVPN to further protect my phone and computers. I am not associated with Instagram and other social media outlets and shopping websites with all the malware and other undesirable content associated with them.

Email: All email communication is sent and received either through Drake Software or Verifyle both of which are encrypted and password protected. The only time I send an attachment to you is through my tax software or Verifyle. I will send your tax returns as PDFs, and all social security numbers and other sensitive data are masked with asterisks.

Interestingly dates of birth are not printed on any tax forms. I will never send personal information such as social security numbers, dates of birth, or passwords through email.

Client Portal: I use Verifyle to securely allow you to upload files to me, and for me to upload files to you. They use six-level 256-bit encryption and market themselves to firms specifically in the financial and accounting industries. I also send and receive e-file authorization forms through this portal for e-signature. They are best in class for ease of use, but they are also best in class for security.

Credit Card Payments: I do not currently accept Credit card payments. I encourage clients to pay securely via Zelle, Venmo or Paypal to avoid having to mail checks.

Please contact me with additional questions or concerns. I wanted to briefly explain the several policies and procedures to protect your security and privacy. Thanks!