



Enhancement tools for the paperless world

New Breach of Privacy Laws: Securing Client Document Exchange



www.cpasafemail.com

Enhancement tools for the paperless world!

THE NUMBERS

“CPA Safe Mail
was designed
because your
clients are at
risk”

➤ **10 million:**

The number of Americans a year that are victims of identity theft

➤ **330 hours:**

The average number of hours victims spend repairing the damage caused by identity theft

➤ **\$1,820 to \$14,340:**

Average victims wage loss in dealing with their identity theft cases

➤ **\$851 to \$1,378:**

Average victims expenses related to their identity theft case

Source - The Aftermath Study
www.idtheftcenter.org

THE PERCENTAGES

“Are you aware that identity theft has a long lasting impact on your clients?”

- **19% of victims:**
Have higher credit rates
- **16% of victims:**
Have higher insurance rates
- **47% of victims:**
Have trouble getting credit or a loan
- **70% of victims:**
Have trouble getting rid of (or never get rid of) negative information in their records
- **11% of victims:**
Have difficulty getting a job

Source

www.IdentityTheftSecurity.com



“There are laws designed to protect your firm and your clients”

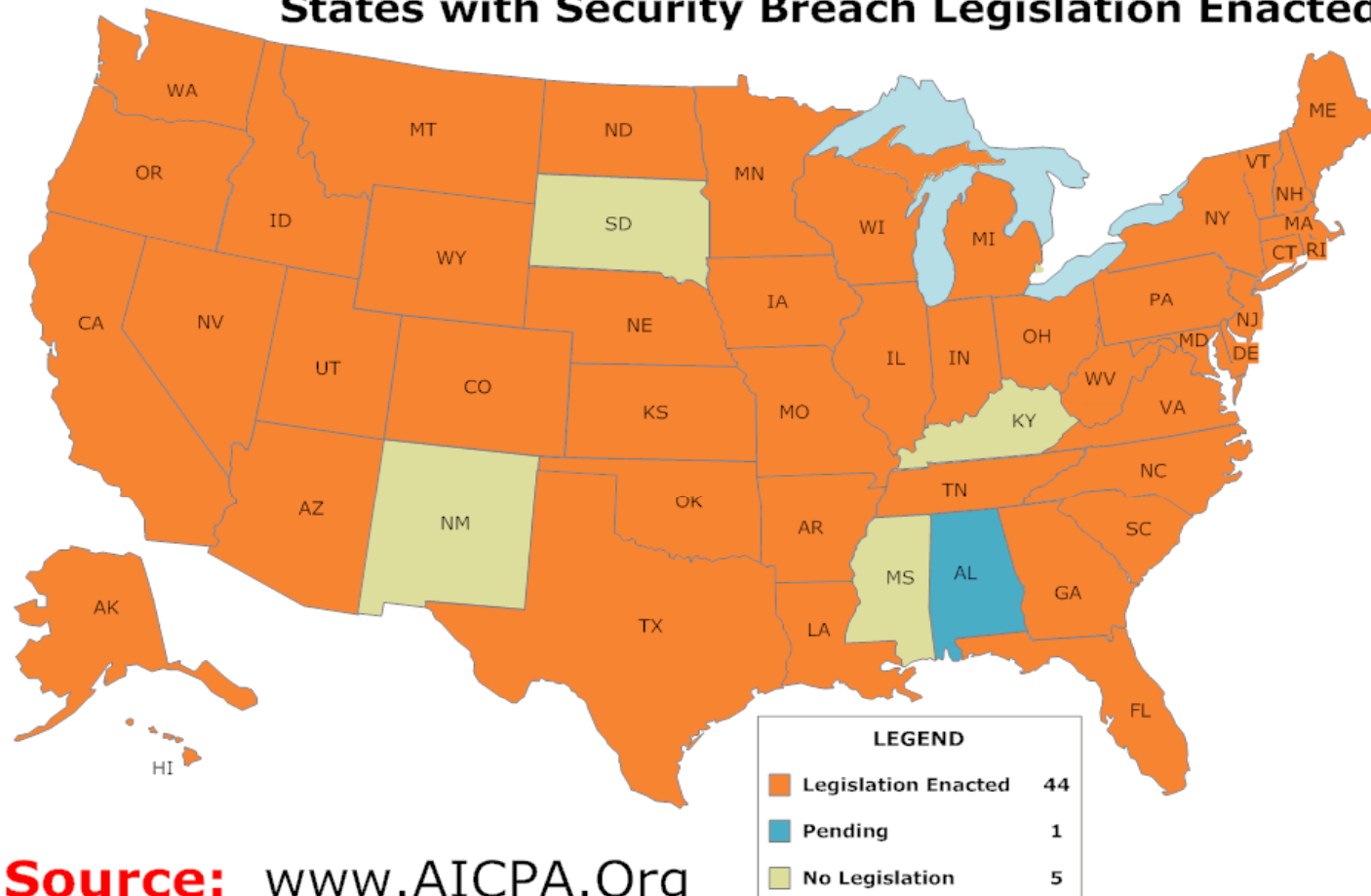
“You must comply with the law”



DO YOU KNOW...

HOW MANY STATES HAVE ENACTED A BREACH OF PRIVACY LAW?

States with Security Breach Legislation Enacted



Source: www.AICPA.Org

“45 states have enacted a breach of privacy law. What does this mean to your business?”



YOUR BUSINESS MUST COMPLY WITH STATE BREACH OF PRIVACY LAWS

“Each state defines how it’s residents private information must be protected, stored and exchanged”

Locations	Yes	No
In all states that your firm is licensed	✓	
In all states that your clients reside	✓	
In all states where you conduct business	✓	



MASSACHUSETTES 201 CMR 17.00



Defines “Personal Information (PI)” and Defines Encryption Requirements

**PI = First Name (or First Initial) / Last Name
combined with ANY of the following:**

• Social Security #	• Credit Card #
• Drivers License #	• Debit Card #
• Financial Account #	• State ID Card

“California,
Massachusetts
and Nevada are
leading the way
in proactive
breach of
privacy laws”



Requires Encryption for All PI:	Yes	No
Stored on portable devices: (laptops, external hard drives, thumb drives)	✓	
Transmitted wirelessly	✓	
Sent over the Internet or any public network: (email or Portal)	✓	

HISTORY OF: SECURE DOCUMENT EXCHANGE CHALLENGES OF ELECTRONIC DOCUMENT EXCHANGE



30%
Adoption



Too
Complex



Too
Large



Labor
Intensive



Not
Secure



“Are you telling me that only 30% of our clients will use our Client Portal?”

“Are you saying we’re back to square one? Using Email?”

*Tax Partner
Dallas, TX 5/2009*



“There is proposed federal legislation to standardize the breach of privacy laws”

House Concurrent Resolution 425

- Expected to mirror the Massachusetts state requirements

You need to
securely send
your client a
document.

CPA Safe Mail
was built
because your
clients are
asking..."



Why can't
you just
email it to
me?



www.cpaperless.com

800.716.2558

sales@cpaperless.com

CPA SafeMail

Now you can!

- **Securely exchange confidential documents with your clients via email**
- **Innovative technology designed to specifically meet the needs of accounting firms (Includes APM™ and PDF MBC™)**
- **Built to address compliance requirements with breach of privacy laws**



Our Clients Include...

What Type of
Firms are Buying
CPA Safe Mail

- **Firms that are currently transferring confidential documents:**
 - As unsecured email attachments
 - Manually password protecting & encrypting email attachments

- **Firms that are looking for a solution that is less complex and less expensive than an ftp site or Client Portal**

- **Firms looking for quick and easily deployable solutions**
 - Designed to be easy to use.
 - As you will see, it does not change your existing pattern of behavior.
 - Takes one (1) hour set-up and 15 minutes to train





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FIRM OBJECTIVES - DOCUMENT EXCHANGE SOLUTIONS (TO AND FROM CLIENTS)

Traditional Objectives	Yes	No
1. Small File Exchange (Email)	✓	
2. Large File Exchange (Client Portals /FTP Sites)	✓	
3. Client Copies (Client Portals)	✓	
4. Finding a Solution That Works for 100% of Your Clients	✓	

2009 Objectives	Yes	Maybe
5. Security – HOT TOPIC for 2009!	✓	
6. Fundamental Shift in Business Process	✓	
7. First To Implement Wins the Standardization Game	✓	

CPA Safe Mail
is easy to
use...

Your staff and
your clients
will thank you!



PRODUCT DEMONSTRATION

Partner



Objectives

- 1) Comply with Request
- 2) Compliance with Breach of Privacy Laws
- 3) Complete Task Quickly

Client



**Tax
Return**

Email



Manager



Objectives

- 1) Comply with Request
- 2) Compliance with Breach of Privacy Laws
- 3) Complete Task Quickly

Client



**Privacy
Policy**



**Sch C
P&L**



**Tax
Return**

Email



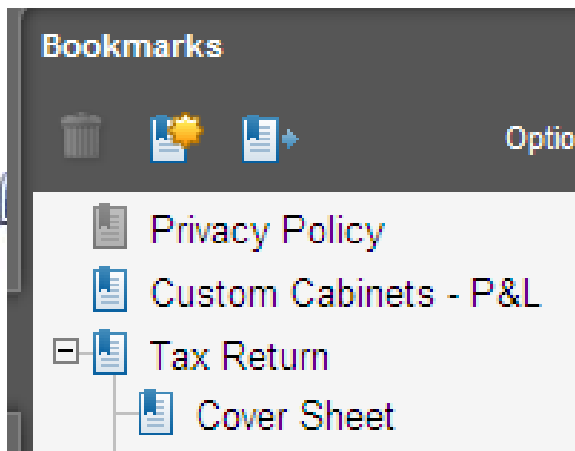
Manager



Objectives

- 1) Comply with Request
- 2) Compliance with Breach of Privacy Laws
- 3) Complete Task Quickly
- 4) Convert to PDF**

Client



Email



System Requirements



SYSTEM REQUIREMENTS

Senders (Firm Users):

- Microsoft Outlook 2007
- Microsoft .NET Framework 2.0
- Internet Connection
 - (Automated Password Manager)

Recipients (Clients & Staff):

- Adobe Acrobat Reader (Free Version)
- ZIP Decompression Tool (Standard in Windows)

What do we
do next?



NEXT STEPS

- **FREE 30 Day Trials**
- **FREE Training Videos**
- **FREE Workshops**

Available to all members of your firm!

➤ **Contact Us:**

Web: www.cpaperless.com

Email: sales@cpaperless.com

Phone: (800) 716-2558 x 100