

INFORMATION SECURITY BRIEF

MARCH 2024

Tips for a Hack-Proof Tax Season

The IRS identified in 2022 that there were more than 5.5 billion dollars in tax-related scams and an additional 31.6 billion in other related financial crimes (IRS 2023 Annual Report). As the tax season approaches, protecting your sensitive information becomes crucial. Whether utilizing tax assistance tools or collaborating with trusted partners, exercising due diligence is essential. Below are vital considerations, from secure document-sharing methods to avoiding solicitation pitfalls, aiming to empower you to navigate tax preparations confidently and securely.

Tools and Partners

Whether partnering with a trusted individual or utilizing tax assistance tools, conducting thorough due diligence annually is crucial. During tax season, when sharing highly confidential information about yourself and your family, consider the following:

- What method will you use to share your documents? Secure Email? Online Portal? Is there an MFA on the portal?
- Where will these files be stored during the collection/submission process and, more importantly, after the tax season?
- Who will have access to your files?
- Always ensure that any online file sharing is on a secure site, and verify the legitimacy of the URL. Many may appear similar but could have one extra character.

Solicitation and Advertisements

Exercise caution with cold emails, unprompted reach-outs, and copycat ads. While there are trustworthy resources, there are also untrustworthy ones. Consider the following when conducting searches:

- **Cold Emails:** Verify the identity of the email sender and the validity of the links they share. Always hover over hyperlinks to preview the link before clicking.
- **Copycat Ads:** Confirm whether an ad for TurboTax, for example, actually leads to TurboTax or if it redirects to a deceptive site, attempting to exploit your funds or, more significantly, your data.

If you feel you have been a target of tax or identity-related fraud, file a report with the Federal Trade Commission.

You can find the full IRS 2023 Report on [the IRS Website](#).