



Security of your data is our highest priority. As a TaxCaddy user, you will benefit from best-in-class technology, data centers, and infrastructure to meet the strict requirements of the most security-sensitive CPA firms in the world.

Infrastructure:

TaxCaddy is built with layers of protection across a secure, reliable infrastructure. TaxCaddy leverages the Microsoft Azure cloud to ensure data security through encrypted communications, threat management, and threat mitigation practices, including regular penetration testing. TaxCaddy uses Amazon Web Services for secure, reliable storage. Your documents and data are encrypted in transit and at rest using Amazon's best-in-class Secure Socket Layer and Server-Side Encryption technologies.

Testing and Validation:

TaxCaddy has been audited, tested, and validated by C-Level Security, LLC. C-Level Security is an independent, security-focused consulting firm employing leaders in the industry. TaxCaddy was found to enforce security controls to support a secure processing solution. The C-Level security attestation can be downloaded at taxcaddy.com. Additionally, TaxCaddy is used by two of the largest CPA firms in the world, and it's been through their rigorous security testing and validation.

SOC 2 Audit:

SurePrep, the developer of TaxCaddy, received a SOC 2 Type 1, an independent service auditor's report on controls relevant to security, availability, confidentiality, and processing integrity set forth by the AICPA Trust Services Criteria.

Smart Links:

Credentials for your Smart Links accounts are encrypted from the moment you enter them, so nobody can ever see or steal your data as it is transmitted to or from your account. No matter what device you use, from your desktop browser to your mobile phone, your data is always sent using 256-bit Secure Socket Layer encryption.

Your tax documents are delivered directly to your TaxCaddy account—no other service gets access to your documents, nor are they stored anywhere else. If you choose to delete any of the documents in your TaxCaddy account, those documents are permanently deleted—you maintain full control of your tax documents. You can delete any (or all) of your Smart Links any time you want. When you delete a Smart Link, your encrypted username and password information is deleted immediately.

Passwords and Two-Factor Authentication:

To help keep your TaxCaddy account safe, the system requires a strong password that includes a number, a special character, both uppercase and lowercase letters, and a minimum of 8 characters.

TaxCaddy uses two-factor authentication to help keep your account secure by prompting you to enter your password and a unique, one-time verification code each time you log in. Although you can select “Don't ask me for verification again on this computer,” we recommend you always keep the two-factor authentication enabled on all devices.

We regularly review and update security policies; provide security training; perform application and network security testing, including penetration testing; monitor compliance with security policies; and conduct internal and external risk assessments.