

Information for Accountants on IRS Data Security Plan Requirements

1. PTIN Renewal Form (W-12): p.2, line 11:

<https://www.irs.gov/pub/irs-pdf/fw12.pdf>

2. PTIN Renewal Form (W-12) Instructions: p.3, line 11:

<https://www.irs.gov/pub/irs-pdf/iw12.pdf>

3. IRS Publication 4557, Safeguarding Taxpayer Information: A Guide for Businesses: p. 3, and more:

<https://www.irs.gov/pub/irs-pdf/p4557.pdf>

4. IRS Authorized E-File Handbook: p.7,8:

<https://www.irs.gov/pub/irs-pdf/p1345.pdf>

5. IRS Newsroom Bulletin:

<https://www.irs.gov/newsroom/heres-what-tax-preparers-need-to-know-about-a-data-security-plan>

6. IRS Revenue Procedure Rev. Proc. 2007-40: Section 5.03:

https://www.irs.gov/irb/2007-26_IRB#RP-2007-40

7. IRS Publication 5417:

<https://www.irs.gov/pub/irs-pdf/p5417.pdf>

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