



From Overwhelmed to Empowered

How SOHO Protection Helped a Solo Tax Practitioner Gain Peace of Mind

OVERVIEW

Rachel Watkins, CPA, runs a one-person tax practice in Northern Nevada, serving small businesses and individuals with complex tax-planning needs. Like many sole practitioners, she must comply with strict IRS and FTC cybersecurity rules—including maintaining a Written Information Security Plan (WISP)—to retain her PTIN and malpractice coverage.

Despite understanding these requirements, Rachel struggled to find an IT provider who understood the regulatory and operational needs of solo accounting practices. Local IT professionals either dismissed her compliance requirements, lacked cybersecurity expertise, or only worked with larger firms.

After attending multiple cybersecurity webinars presented by Donny Shimamoto, CPA, CGMA, CITP, Inspiration Architect for the Center for Accounting Transformation, Rachel finally learned that the Center offered a dedicated solution for small practices: the SOHO Protection Package.

CHALLENGE

Rachel knew she needed cybersecurity safeguards to maintain her PTIN, meet FTC and IRS expectations, and satisfy malpractice insurance requirements. However:

- DIY attempts fell short: While she downloaded and partially completed the AICPA WISP template, she couldn't implement the necessary technical controls.
- Local IT providers were unable to help:
 - One dismissed antivirus entirely.
 - Others only served large companies and would not support a solo practitioner.
 - Her state CPA society could only recommend firms that weren't a proper fit for her scale or needs.
- She felt stuck and unsupported: "I didn't know the first thing about cybersecurity... I couldn't find anyone who understood what I needed."

For nearly two years, Rachel searched for a partner who understood both cybersecurity and the accounting profession.

SOLUTION

The SOHO Protection Package, delivered through the Center for Accounting Transformation, gave Rachel exactly what she needed: a comprehensive cybersecurity solution that is affordable, CPA-aligned, and backed by a team that handles both the technology and the compliance requirements.

CASE IN FOCUS

Recognizing the Need

- Sole practitioner with growing regulatory requirements.
- Needed a compliant, comprehensive WISP and aligned security controls.
- Could not find an IT provider familiar with tax practitioner cybersecurity obligations.
- Discovered the Center's SOHO Protection Package.

Proof of Progress

- Fully personalized WISP created for her practice.
- Implementation of proactive safeguards (MFA, password manager, secure cloud storage, Teams migration).
- Annual cybersecurity reviews and recommendations.
- Guidance delivered in a way that is easy to understand, with no technical background required.
- Improved resilience not just for cyber threats, but also against regional natural disasters like wildfire risks.

WHAT THE SOHO TEAM DELIVERED

- Complete WISP Creation
- The team conducted interviews, drafted her WISP, and personalized it for her practice's processes and risks.
- Full Implementation of Proactive Controls
- Including:
 - Multi-factor authentication (MFA)
 - Secure password management
 - Email security enhancements
 - Migration from third-party file storage to Microsoft Teams
 - Strengthened digital and physical backup strategies
- Hands-on, guided support

"They told me what I needed to do and walked me through everything. They did all the work for me."

- Annual Cybersecurity Review
- The team reviews threats, recommends updates, and handles ongoing changes each year.

Rachel never had to decode acronyms or understand complex configurations—the team translated everything into clear, actionable steps.

IMPACT

The SOHO Protection Package has given Rachel confidence, clarity, and resilience:

- Full compliance with WISP, PTIN, malpractice insurance, and IRS expectations.
- A documented, dependable recovery plan, including contingencies for wildfires—one of her region's highest risks.
- The ability to resume work quickly even if her computer is destroyed.
- A trusted partner to update safeguards as threats evolve.

"I don't have to worry about whether I'm meeting requirements. The team did the initial interviews, drafted the entire WISP for me to review and customize, walked me through what I didn't know how to do — which was a lot, and then handled the rest."

She now feels confident in both her security posture and her ability to demonstrate responsible protection of client information.

GAIN PEACE OF MIND

Cybersecurity is now a mandatory responsibility for every tax practitioner—but you don't need to become a cybersecurity expert to meet the requirements.

The SOHO Protection Package helps solo and small practitioners safeguard client data, meet regulatory standards, and stay prepared for the unexpected.

When a cyber threat or disaster strikes, will you have a plan—or a partner?

Let the Center for Accounting Transformation's SOHO Protection team provide the Peace of Mind, Vision & Clarity, and Hope your practice deserves.

RESULTS

- **Peace of Mind** - Knowing Rachel is protected, compliant, and supported by cybersecurity experts.
- **Vision & Clarity** - Clear steps, guided implementation, and annual updates.
- **Hope** - Assurance that small firms can achieve enterprise-level protection with the right partner.

Additional outcomes:

- No cybersecurity incidents.
- Stronger data protection and workflow security.
- Streamlined technology ecosystem.
- Renewed confidence in her practice's long-term sustainability.



"I would absolutely recommend the Center for Accounting Transformation's SOHO Protection Package to any other tax practitioner."

-Rachel Watkins, CPA

