

Taxware Systems Inc.



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Fraud and Identity Theft

We recently attended the 2008 IRS Software Developers Conference. One of the more interesting topics that was talked about was security, fraud, and identity theft. We have included a couple of government links to help teach you more about what to look for in helping protect yourself and your clients. With the Internet and the creativity of the criminals growing each year we need to do all that we can to protect against fraud and identity theft. A few things we learned from the conference where:

- Dumpster divers are hitting the trash cans. Be careful what your throw away. Anything with sensitive information should be shredded.
- Information "Phishing" is on the rise. Criminals will post web sites and e-mails that look legitimate, but ask you to enter sensitive information.(SSN's, DOB's, Credit Card numbers, etc). As you are browsing web pages its a good Idea to look at the URL address to make sure your are really on your intended web page, and it's a company you trust.
- The IRS will not send you an e-mail nor will they create a standard web page asking for your credit card or debit card information.
- If you are suspicious about the information being asked about by any web page or e-mail call the company directly using a known trusted telephone number. If you suspect a web site or e-mail the IRS has asked that it be reported at Phishing@Irs.gov. About half of the criminal sites are shut down due to public reporting.
- Taxware Systems will not ask you for your credit card or debit card, SSN, DOB's through e-mail or our website.
- We shred faxes that contain names and SSN's you send to us for support reasons.

Onguardonline.gov

www.ftc.gov/theft

<http://www.irs.gov/privacy/article/0,,id=179820,00.html>

Upcoming Tax Seminars

We just finished attending the CSEA(California Society Of Enrolled Agents) sponsored seminars. It was great to meet and talk to many of you. This year we will be attending three of the upcoming IRS sponsored seminars. August 4-6 Florida, August 18-20 Las Vegas, and September 8-10 San Diego.

We will also be attending the California Franchise Tax Board E-File seminars, but we are still waiting for final dates and locations.

Our annual seminar will be held during the first part of January 2009. We will send more information on that when we get closer to tax season. We encourage everyone to attend, but especially recommend that our new clients attend if at all possible.

Taxware's Summer Schedule

We are all feeling the pinch of the increased fuel costs. We are trying to help our employees with some of the increased commuting expenses. Starting July 1 through September 30th we will be switching to a four day work week. Summer office hours will be Monday through Thursday 8 AM to 5 PM for telephone support. October 1st we will move back to our normal Monday through Friday days and hours, and during the tax season we will increase our support hours to handle the tax season volume.

We hope this will not be an inconvenience to you. We'll try it and see how it goes.

Software Piracy

The majority of Taxware's clients have been with us for a long long time. We appreciate you and appreciate our partnership with you to help develop the best software tools in the tax business. We have left off the time consuming step of having to register each software tool because we wanted to make installation as easy as possible for you. We trust that you honor the site license and the majority of you do. I won't get into all the license information, but the major parts are that we license the software to be used per tax year, per office location. For those of you going out to your clients via laptop that is fine too. For those of you with multiple offices and unique license needs refer to your license or give us a call and we can answer any questions that you might have.

Please do not allow the software to be installed at unlicensed locations. It has come to our attention that there are a number of office addresses that don't match what we have on file and or preparation firm names and locations that we do not have any information on. Some have even called in for support and updates, but after talking it was clear that they had not licensed the software.

We have thought about different ways to help stop some of the piracy. We are going to an approach that we hope will be seamless to you. Starting this upcoming tax season we will hard code and validate the paid preparer address. We will build the initial validation data from data that we have on file for you. If this is different or has changed please fax or e-mail your firms address to us.

We will also provide a link on our web site to change this information quickly and easily.

In weighing how intrusive registry methods can be, versus keeping things open and user friendly, we hope that this will be a good step in encouraging people to obtain valid licenses.