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FREE IT ACCESS CHECKLIST

Who still has access to your firm's files?

Former employees. Old devices. Forgotten logins.

10 questions to ask your IT company. Bring these to your next check-in. A good IT partner answers them quickly, in writing, and without jargon. If an answer is unclear, ask who will verify it, and by when. Mark each one as you go.

01 When someone leaves, how fast is their access shut off?

A good answer: the same day, from a written offboarding checklist, and they can show you the last time it happened.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

02 Who has an active login to our email and files right now?

A good answer: a current list of every account, matched against your actual staff, with no names you don't recognize.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

03 Is any mailbox forwarding email outside the firm?

A good answer: they check for outside forwarding regularly, block it by default, and get alerted when someone sets it up.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

04 Whose phones can still approve sign-ins to our accounts?

A good answer: sign-in approval devices are removed the day someone leaves, and lost or replaced phones are cleared too.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

05 Who can open our shared folders, including people outside the firm?

A good answer: a report of who can see client folders, plus a habit of expiring outside sharing links.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

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10 questions to ask your IT company (continued)

06 Do former staff still have logins to our other apps?

A good answer: billing, e-signature, practice management, and bank portals are on the offboarding list, not just email.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

07 Who holds the master keys to our systems?

A good answer: a short, named list of admin accounts, none of them shared or tied to someone who no longer works with you.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

08 Are firm files still synced to laptops or phones we don't control?

A good answer: they can remotely wipe firm data from any device, including personal phones, when someone leaves.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

09 If a former employee logged in tonight, would anyone notice?

A good answer: suspicious sign-ins trigger an alert that a real person reviews, day or night.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

10 When was our last access review, and can we see it?

A good answer: within the last quarter, documented in writing, ready to hand to your insurer or a client's security questionnaire.

☐ Got a clear answer ☐ Not sure ☐ Need to follow up

How did you do? Every "not sure" or "need to follow up" is an open door. The fix is usually quick once someone knows where to look.

Find out who still has keys

Book a free 30-minute access review with a real, local engineer. We'll walk through these 10 questions for your firm and give you a plain-English list of what to close. No pressure, no jargon.

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