

Your Selections: Keyword: **WISP**

Written Information Security Plans (1 hour)

 August 14, 2026 2:00pm - 3:00pm PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 August 17, 2026 8:00am - 9:00am PDT  Online 1.00 Credits  Member Price: \$55

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Written Information Security Plans (1 hour)

 August 17, 2026 11:00am - 11:57am PDT  Online 1.00 Credits  Member Price: \$39

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Written Information Security Plans (1 hour)

 September 2, 2026 10:00am - 11:00am PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 September 11, 2026 6:00am - 7:00am PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

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Written Information Security Plans (1 hour)

 September 21, 2026 7:00am - 7:57am PDT  Online 1.00 Credits  Member Price: \$39

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. Starting with the 2024 PTIN renewal season, all PTIN holders must certify they have a WISP and have trained employees, staff, and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through Circular 230, AICPA Statements of Standards, and Federal Trade Commission (FTC) regulations. Attendees will gain practical guidance on writing an effective WISP and ensuring compliance with due diligence standards for data security.

Written Information Security Plans (1 hour)

 September 25, 2026 6:00am - 7:00am PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 September 29, 2026 10:00am - 11:00am PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 October 5, 2026 8:00am - 9:00am PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 October 16, 2026 2:00pm - 3:00pm PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 October 20, 2026 9:30am - 10:30am PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

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 October 21, 2026 11:00am - 11:57am PDT  Online 1.00 Credits  Member Price: \$39

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Written Information Security Plans (1 hour)

 November 4, 2026 9:00am - 10:00am PST  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 November 9, 2026 11:00am - 12:00pm PST  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 November 12, 2026 9:00am - 10:00am PST  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS

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Written Information Security Plans (1 hour)

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Written Information Security Plans (1 hour)

 November 23, 2026 7:00am - 7:57am PST  Online 1.00 Credits  Member Price: \$39

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Written Information Security Plans (1 hour)

 November 23, 2026 10:00am - 11:00am PST  Online 1.00 Credits  Member Price: \$55

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Written Information Security Plans (1 hour)

 December 7, 2026 8:00am - 9:00am PST  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 December 14, 2026 11:00am - 11:57am PST  Online 1.00 Credits  Member Price: \$39

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Written Information Security Plans (1 hour)

 December 22, 2026 2:00pm - 3:00pm PST  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 December 28, 2026 8:00am - 9:00am PST  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 January 4, 2027 9:30am - 10:30am PST  Online 1.00 Credits  Member Price: \$55

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Written Information Security Plans (1 hour)

 January 12, 2027 7:00am - 7:57am PST  Online 1.00 Credits  Member Price: \$39

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Written Information Security Plans (1 hour)

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Written Information Security Plans (1 hour)

📅 February 2, 2027 8:00am - 9:00am PST 📍 Online 1.00 Credits 💰 Member Price: \$55

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Written Information Security Plans (1 hour)

📅 February 18, 2027 6:00am - 7:00am PST 📍 Online 1.00 Credits 💰 Member Price: \$55

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Written Information Security Plans (1 hour)

 February 24, 2027 9:00am - 10:00am PST  Online 1.00 Credits  Member Price: \$55

Thsi course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implentation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliances is enforced through IRS Circular 230, AICPA Statments of Standards, The American Bar Associations and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 March 3, 2027 8:00am - 9:00am PST  Online 1.00 Credits  Member Price: \$55

Thsi course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implentation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliances is enforced through IRS Circular 230, AICPA Statments of Standards, The American Bar Associations and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 March 9, 2027 8:00am - 9:00am PST  Online 1.00 Credits  Member Price: \$55

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Written Information Security Plans (1 hour)

 March 15, 2027 8:30am - 9:30am PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 March 26, 2027 11:00am - 12:00pm PDT  Online 1.00 Credits  Member Price: \$55

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. All PTIN holders must certify they have a WISP prior to renewal, along with certifying the training of employees, staff and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through IRS Circular 230, AICPA Statements of Standards, The American Bar Association and the Federal Trade Commission (FTC). This event may be a rebroadcast of a live event and the instructor will be available to answer your questions during the event.

Written Information Security Plans (1 hour)

 April 6, 2027 11:00am - 11:57am PDT  Online 1.00 Credits  Member Price: \$39

This course provides a comprehensive overview of Written Information Security Plans (WISP), focusing on their purpose, requirements, and implementation. Starting with the 2024 PTIN renewal season, all PTIN holders must certify they have a WISP and have trained employees, staff, and contractors as necessary. Participants will explore the history and legal foundation of WISP under the Gramm-Leach-Bliley Act, and how compliance is enforced through Circular 230, AICPA Statements of Standards, and Federal Trade Commission (FTC) regulations. Attendees will gain practical guidance on writing an effective WISP and ensuring compliance with due diligence

standards for data security.

Data Protection and IRS Compliance: Crafting an Effective WISP (2 hours) - OnDemand Webcast

 Available Until March 31, 2027  On-Demand 2.00 Credits  Member Price: \$69

Protecting financial client data is crucial to maintaining trust and integrity in the financial industry. A Written Information Security Program (WISP), required by the IRS, is designed to help tax pros effectively plan data security. Andrew Lassise, of Tech 4 Accountants/Rightworks, shares his expertise in helping tax and other financial professionals with IRS compliance and data protection measures. He explains how to maximize the IRS requirement to complete a WISP, offering a helpful road map for tax pros to protect their clients and themselves with a comprehensive cybersecurity strategy.

Handling Conflicts, Errors, and Due Diligence on Tax Returns (4 hours) - OnDemand Webcast

 Available Until March 31, 2027  On-Demand 4.00 Credits  Member Price: \$99

Tax practice demands more than technical calculations; it requires sound judgment under Circular 230, the AICPA Code, and the 2024 SSTS revisions. This course shows how to recognize and manage conflicts of interest (possible, potential, actual), obtain and document informed consents, and decide when withdrawal is required. You'll learn what to do when client errors or omissions surface, how SSTS 1.2 and Circular 230 §§10.21/10.22 shape your duties, and how to protect clients (and yourself) with engagement letters, scope clarity, and careful documentation. We'll translate due-diligence principles into daily practice: what you may rely on, when to probe, how to mitigate §6694 exposure, and how to organize files to preserve work product. The program also covers controversy representation (2848 vs 8821), WISP/data-security expectations, and practical checklists that elevate quality review and reduce malpractice risk.