

# Six Questions for Your IT Provider

Ask your current provider, your in-house team, or any provider you're considering. Write their answers in the right column. Under each question is what a good answer includes.

*Put together by Brian Butterfield, CISSP, from about 30 years in IT and cybersecurity. He isn't a lawyer, CPA, or insurance agent. This is what he's learned protecting firms like yours.*

PROVIDER OR PERSON ASKED

ASKED BY

DATE

| # | QUESTION                                                                                                                                                                                                                                                                                                                                                 | THEIR ANSWER                                                         | OK?                      |
|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|--------------------------|
| 1 | <b>Can you list every AI tool used on our computers in the last 30 days?</b><br><b>Good answer:</b> An actual list, or a clear statement of what they can't see. Not "nobody here uses AI."                                                                                                                                                              | <input type="text"/><br><input type="text"/><br><input type="text"/> | <input type="checkbox"/> |
| 2 | <b>Which AI features are already turned on inside the software we license, and who turned them on?</b><br><b>Good answer:</b> The programs named (tax, accounting, document, email), whether each AI feature is on or off, and whether it can be turned off at all. Some can't be turned off one by one, and that's still an answer you can plan around. | <input type="text"/><br><input type="text"/><br><input type="text"/> | <input type="checkbox"/> |
| 3 | <b>Do the terms of the AI tools we use allow the vendor to keep our data or train on it?</b><br><b>Good answer:</b> The actual terms. Free and paid versions of the same tool often have different terms.                                                                                                                                                | <input type="text"/><br><input type="text"/><br><input type="text"/> | <input type="checkbox"/> |
| 4 | <b>If someone pasted a client return into a free AI tool today, would we know?</b><br><b>Good answer:</b> A clear yes or no about logging. If it's no, that can be fixed.                                                                                                                                                                                | <input type="text"/><br><input type="text"/><br><input type="text"/> | <input type="checkbox"/> |
| 5 | <b>What does our security plan say about AI, and who wrote that section?</b><br><b>Good answer:</b> The actual section, and when it was last updated.                                                                                                                                                                                                    | <input type="text"/><br><input type="text"/><br><input type="text"/> | <input type="checkbox"/> |
| 6 | <b>If client information ends up in an AI tool, who do we call first, and what do we save?</b><br><b>Good answer:</b> A named person, what gets preserved before anything is deleted, and who decides on notification.                                                                                                                                   | <input type="text"/><br><input type="text"/><br><input type="text"/> | <input type="checkbox"/> |



## Want the answers in writing?

Book a free 30-minute AI Risk Review with me by video or phone. I'll walk through the same ground for your firm, and you get a written report, usually within about 10 days.

[micro-tech.com/txcpa](https://micro-tech.com/txcpa) · 954-327-1001

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