



e-News

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How to keep your financial documents secure using Adobe Acrobat software



At e-BAS Accounts, it is common for us and our clients to share documents like Tax File Declarations, BAS, ASIC files, ABN data, bank statements and more. All of this data contains client-sensitive information like Tax File Numbers, addresses, ABN's, dates of birth etc. If intercepted by cybercriminals, this is the sort of data that is used to steal identities and in other dark-web activities.

Unfortunately, while sending such data via email is highly convenient, it is also one of the least secure methods for sharing documents. That said, many clients still use email for this purpose (even though we advise against it!). So, if email is being used to share financial data with/from clients, we take some precautions. These precautions not only protect our clients' data but also help to protect our practice from possible data breaches and subsequent penalties. Before sharing documents via email, we use one of two (sometimes both) Adobe Acrobat tools to protect our clients' data. These include:

1. Removing sensitive data using the *redact tool* and
2. Adding *passwords* to documents

If you are interested in how these two tools work, see below.

Redact Tool

Before sending, if there are parts of a document that you want to hide from the recipient such as text, images or hidden data, use the [redact tool](#). The recipient will not be able to view any redacted data in the document.

[Video - How to use the Adobe Redact Tool](#)

Password-Protect Documents

As well as redacting parts of a document, you can also password-protect it. Here's the [link to the Adobe guide on how to do that](#). The recipient will require a password to open the document. We generally send that password by SMS, separate from the email for further security.

[Video - How to password-protect a PDF with Adobe Acrobat](#)

As an aside, we aren't trying to sell Adobe software to you here! It's just that we use it in our practice and like it. If you use another software, that's great. The idea behind this newsletter is to simply highlight the importance of securing your documents before you share them digitally, not to sell you a product :-)

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STP PHASE 2

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