

## **Professional Services IT Environment Checklist**

**Is your firm's IT truly secure, compliant, and built to support your growth and obligations? Take a moment to reflect on these 10 questions.**

- 1. Is your technology setup aligned with compliance expectations like FTC Safeguards, HIPAA, or SOC 2?**  
☐ Yes      ☐ Somewhat      ☐ Not Sure
- 2. Are your cloud-based systems secured and configured properly?**  
☐ Yes      ☐ Mostly      ☐ Needs Review
- 3. If audited tomorrow, could you produce the IT documentation your clients, insurers, or regulators would expect?**  
☐ Yes      ☐ Possibly      ☐ Not Confident
- 4. Are your backups tested regularly and proven to restore critical data quickly and completely?**  
☐ Yes      ☐ Not Sure      ☐ Not Confident
- 5. Have you reviewed or updated your cybersecurity protections within the past year?**  
☐ Yes      ☐ Recently Considered      ☐ Not Yet
- 6. Do you have clear, written IT policies, even if your team is small or hybrid?**  
☐ Yes      ☐ Somewhat      ☐ No Policies
- 7. Do you know who to call when something breaks or looks suspicious, and do they respond quickly?**  
☐ Always      ☐ Sometimes      ☐ Not Really
- 8. Is your team fully protected with tools like MFA, endpoint protection, and access monitoring?**  
☐ Yes      ☐ Somewhat Protected      ☐ Not Sure
- 9. Do you receive clear, professional explanations when IT issues or decisions come up?**  
☐ Yes      ☐ Sometimes      ☐ Not Often
- 10. Does your current IT strategy support your long-term goals and growth—not just short-term fixes?**  
☐ Yes      ☐ Somewhat      ☐ No Plan in Place

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## **What's Next?**

This checklist is a great first step toward understanding how your technology supports your firm's ability to stay secure, compliant, and confident. But you don't have to figure it all out alone.

## **We can walk through it with you, point by point.**

Our team at Hart Technology Solutions helps professional services firms implement IT systems that are dependable, compliant, and designed to adapt as your firm evolves.

Contact us to schedule a review of your checklist, and let's move forward together.

## **The Hart Technology Solutions Team**

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