

## WISPWOLF · COMPLIANCE STARTER KIT

# Cyber Insurance Questionnaire Guide

This is a free starter resource from WISPWOLF to help tax preparers and small firms identify their compliance gaps. It is **not** a completed Written Information Security Program. For a customized WISP, compliance score, remediation tracking, and evidence organization, generate yours at **wispswolf.com**.

## Why this guide exists

Cyber insurance applications for tax preparers now ask for evidence, not intent. Underwriters at Travelers, Chubb, Coalition, At-Bay, Beazley, and CNA expect concrete controls and documentation. Use this guide to prepare your answers before the renewal questionnaire arrives.

## Questions you will be asked

- Do you maintain a written information security program (WISP)?
- Date of the most recent annual review of the WISP
- Name and title of the Qualified Individual / Data Security Coordinator
- Is MFA enforced on email, remote access, and tax software?
- Are backups encrypted and tested? How frequently?
- Do you use EDR / next-gen antivirus on every endpoint?
- Do you have a written, tested incident response plan?
- Have you provided annual security awareness training to all staff?
- Do you have a documented vendor due-diligence program?
- Have you had a security incident in the last 36 months?

## Evidence you should have ready

- Current WISP (PDF) with signed annual attestation
- Risk assessment (worksheet or register)
- MFA enforcement screenshots from Microsoft 365 / Google Workspace and tax software
- Backup configuration and most recent restore test result
- EDR coverage report and configuration
- Most recent incident response tabletop / test record
- Training completion records for all staff
- Vendor inventory with last review date

## Red flags that raise premiums or trigger denial

These materially misrepresent your posture and can lead to claim denial.

- Submitting a template with placeholder text as your WISP
- MFA only on the admin account, not on every user
- Backups that exist but have never been restored
- Incident response plan that has never been tested
- Naming a Qualified Individual who is unaware of the role

## Next step

Use WISPWolf to keep your WISP, evidence packets, and renewal-ready answers in one place. Take the 15-question compliance quiz at [wispwolf.com/quiz](https://wispwolf.com/quiz).

## Next step

Generate a customized WISP, get a compliance score, and track remediation evidence at **[wispwolf.com/quiz](https://wispwolf.com/quiz)**. Want a complete Written Information Security Program instead of a starter template? Generate your WISP with WISPWolf.

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