

You've Got This: Building a Secure and Streamlined Tax Office

Practical, stress-free strategies to keep your firm protected, compliant, and ready for what's next.

Technology doesn't have to be confusing or expensive to be effective.

Join this plain-English session created for tax professionals who want to feel confident in their technology — protecting sensitive data, staying compliant, and using new tools like Agentic AI safely and productively.

Presented by: Mike Wise, Owner of Clockwork Networks — a recurring guest speaker for COSEA and NATP, known for filling a gap in the CE landscape: *real-life IT and security education built specifically for tax professionals*.

For those who have attended his prior sessions, these are all-new topics; and for those joining for the first time — let's start the discussion!

 **Date:** Monday, November 17, 2025

 **Time:** 3:00 PM (Koebel Library)

 **Presenter:** Mike Wise, Owner of Clockwork Networks

What You'll Learn:

- ✅ How to keep remote and traveling staff connected safely — and why “privacy VPNs” aren't the same as business-grade secure connections
- ✅ How modern monitoring catches suspicious activity on computers and cloud accounts before it becomes a problem
- ✅ How to simplify compliance and cyber-insurance requirements with a few practical policies
- ✅ Demystifying Agentic AI — what it really is and how *you* can safely use it to boost productivity without risking client data

Why You Should Attend:

Between complex regulations, client demands, and constant tech changes, most tax pros feel stretched thin. This session cuts through the jargon and gives you real-world steps to secure your data, streamline operations, and feel confident about your IT — even if it's not your comfort zone.

Connect with Mike ahead of time:

He regularly shares quick tech tips, compliance updates, and AI insights for tax professionals on LinkedIn.

 [linkedin.com/in/thatmikewise](https://www.linkedin.com/in/thatmikewise)