

Keep Calm and Secure On Cybersecurity Health Check

	Circle your answers	Actions required:
Protecting Data	<p>Which secure method of protecting personal and sensitive data used by the business (e.g. SoAs, RoAs, Personal statements, Bank/ credit card details) do you use?</p> <p>Communicate through a client portal</p> <p>Password protecting attachments to emails</p> <p>Using emails with no additional security</p>	
	<p>Do you have a process in place to change/cancel log ons when a staff member leaves?</p> <p>Yes No Unsure</p>	
Password management	<p>Do you have systems enforce a password policy e.g. complexity, expiry time frame?</p> <p>Yes, systems have set policies inbuilt</p> <p>No systems do have password policies set</p> <p>Unsure</p>	
	<p>Do you use of password manager by all staff within the business e.g. LastPass, Keeper, Dashlane or 1Password?</p> <p>Yes, password manager used by all staff</p> <p>Password manager used by some staff</p> <p>Not using a password manager using excel or similar list</p>	
Multifactor authentication	<p>Is multifactor turned on for all systems containing client data including Microsoft, CRM etc.?</p> <p>Yes all systems</p> <p>For some systems but not all</p> <p>Unsure</p>	
	<p>Is the 2nd factor connected to a separate device to email e.g. mobile or authenticator?</p> <p>Yes 2nd factor to separate device</p> <p>Turned on but notification is to email</p>	

Firewall	Do you have: Firewall in place?	Yes	No	Unsure
	WiFi access with strong password?	Yes	No	Unsure
	USB storage blocked on computers?	Yes	No	Unsure
	Computers inbuilt encryption is turned on?	Yes	No	Unsure
Patch	Are systems are regularly patched to apply security and other updates?	Yes, daily	Yes, weekly	
		Yes, monthly	Unsure	
Backup & restoration of data	Are backups are taken regularly?	Daily - stored in cloud		
		Weekly - stored in cloud	Unsure	
	How often is there restoration testing of back up data?	Annually	Monthly	Weekly
			Unsure	
Web content filtering	Do you have systems in place to reduce the risk of malware accessing your system?	Yes system is in place _____ <small>(system name)</small>		
		Not in place		
Email content filtering	Do you have email content filtering in place to trap and reduce the number of phishing emails?	Yes system is in place _____ <small>(system name)</small>		
		Not in place		
Cyber insurance	Do you have cyber insurance in place to cover remediation of a cyber incident?	Yes	No	Unsure
Latest operating systems	Does your IT provider ensure you have the latest operating system for your platform (Windows or Mac)?	Yes	No	Unsure
External assessment of IT systems	Has an external assessment of your systems been undertaken by someone other than your IT provider?	Yes, recently	Yes, but a few years ago	
		I rely on my IT provider	Unsure	
Training and education	Is training is provided to all members of the team annually?	Yes, including regular phishing tests		
		Yes, once per annum	No	