Verito

It just works. Securely

Index

Quick Reference Guide

Company Overview

Products & Services

Security & Compliance

Client Resources

Who We Are

Verito provides cloud hosting, managed IT services, and compliance documentation exclusively for tax and accounting firms.

Over 1,000 firms trust us to meet IRS Publication 4557 and FTC Safeguards Rule requirements without the complexity.

What Makes Us Different

- **100% uptime since 2016** – No downtime. Ever.
- **Zero ransomware payments** – Never breached. Never paid hackers.
- **Sub-60-second support response** – Real people. No phone trees.
- **35% faster processing** – Drake, UltraTax, ProSeries, Lacerte optimized.
- **Complete compliance** – IRS, FTC, and GLBA requirements covered.
- **Month-to-month contracts** – No long-term commitments.

Why Tax & Accounting Firms Choose Verito

Generic IT providers don't understand tax software. They don't know IRS requirements. They can't explain FTC Safeguards Rule compliance to your insurance carrier.

We do. Because it's all we do.

Your firm stays compliant. Your data stays protected. Your software runs faster. And you never worry about losing your PTIN, facing FTC fines, or paying hackers.

It just works. *Securely.*

Generic Solutions Create Specific Problems

Most IT providers and cloud hosting companies serve everyone. Law firms. Medical practices. Retail businesses. They don't specialize in anything.

That creates problems for tax and accounting firms:

Compliance Gaps

Your firm must meet IRS Publication 4557 requirements. You're subject to FTC Safeguards Rule. You handle data covered by GLBA.

Generic providers don't know these regulations. They can't produce audit-ready documentation. They won't help you protect your PTIN.

Tax Software Performance Issues

Drake, UltraTax, ProSeries, and Lacerte have specific infrastructure needs. They require optimized server configurations, proper SQL database tuning, and careful resource allocation.

Generic hosting throws your software on shared servers. Performance suffers. Tax season gets harder.

Support That Doesn't Understand Your Work

When Drake crashes at 10 PM during tax season, generic IT can't help. They don't know the software. They don't understand the urgency. They tell you to call Drake support.

You lose hours. Your clients get frustrated. You miss deadlines.

Insurance Requirements

Cyber insurance carriers require specific controls: MFA, EDR, tested backups, incident response plans. Generic IT providers don't track these requirements. When you file a claim, you discover you weren't actually covered.

The Verito Difference

We only work with tax and accounting firms. We know your software. We know your regulations. We know what you need during tax season.

Your compliance requirements become our baseline. Your tax software runs on infrastructure designed specifically for it. Your support calls get answered by people who understand your business.

You don't adapt to generic solutions. We adapt to you.

verito
It just works. Securely.

Private Servers That Don't Crash

VeritSpace delivers dedicated private servers optimized for tax and accounting software.

Your applications run 35% faster than shared hosting. Your data stays isolated in SOC 2-compliant data centers. And you get automatic compliance with IRS, FTC, and GLBA requirements.

What You Get

▶ **Dedicated private servers**
No resource sharing. Your performance doesn't depend on other users.

▶ **100% uptime guarantee**
We haven't had downtime since 2016.

▶ **35% faster processing**
Optimized for Drake, UltraTax, ProSeries, Lacerte, and all major tax platforms.

▶ **Automatic compliance**
IRS Publication 4557, FTC Safeguards Rule, GLBA requirements covered.

▶ **Enterprise-grade security**
Private isolation, encryption, monitored access, tested backups.

▶ **Seamless software access**
Work from anywhere. Any device. Secure connection.

Who It's For

Firms that need reliable hosting without IT complexity. You want your software to work. You want to stay compliant. You don't want to manage servers.

Starting at $69/user/month

Infrastructure & Performance

- **Dedicated private servers –** Your resources. Your performance. Never shared.
- **35% faster processing –** Optimized configurations for tax software.
- **100% uptime since 2016 –** Redundant systems. Automatic failover. Zero downtime.
- **Sub-100ms latency –** Fast response times from anywhere in the US.
- **Scalable resources –** Add capacity instantly during tax season.

Security & Compliance

- **Private server isolation –** Automatic GLBA compliance through data segregation.
- **Encryption at rest and in transit –** AES-256 encryption. TLS 1.3 connections.
- **IRS Publication 4557 compliant –** Secure transmission. Data protection. Access controls.
- **SOC 2 Type II certified data centers –** Audited security controls. Physical protection.
- **Immutable offline backups –** Ransomware-proof. Tested daily. Recoverable in hours.

Software Compatibility

- **Drake Tax**
- **UltraTax CS**
- **ProSeries**
- **Lacerte**
- **ATX (not supported)**
- **QuickBooks Desktop (all versions)**
- **CCH Axcess, ProSystem fx**
- **Thomson Reuters GoSystem**
- **Sage 50, 100, 300**
- **Microsoft Office Suite**
- **All major accounting and tax applications**

Support & Access

- **24/7/365 support –** Real people. Sub-60-second response times.
- **Remote access from anywhere –** Windows, Mac, iOS, Android, Chromebook.
- **Multi-monitor support –** Work like you're in the office.
- **Automatic updates –** Software patches applied without disruption.
- **Migration included –** We handle the entire switch. Zero downtime.

Guaranteed Results

- **Your software runs faster**
- **Your firm stays compliant**
- **Your data stays protected**
- **You never pay a ransom**
- **You file on time, every time**

verito
It just works. Securely.

IT Support That Keeps You Compliant

VeritGuard delivers comprehensive managed IT and security services designed for tax and accounting firms.

We cover everything the IRS and FTC require: MFA, EDR, encryption, employee training, annual risk assessments, and tested backups.

Plus we fix software issues, computer problems, and printer jams. Not just security monitoring like other companies.

What You Get

> **Complete FTC Safeguards Rule compliance**
> MFA, EDR, encryption, training, risk assessments.

> **IRS Publication 4557 compliance**
> WISP documentation, secure transmission, access controls.

> **Comprehensive IT support**
> Software issues, hardware problems, user requests handled.

> **24/7 monitoring and response**
> Threats detected and blocked automatically.

> **Cyber insurance compatibility**
> Documentation your carrier requires.

> **Ransomware protection**
> Offline backups. Tested recovery. Zero payments since 2016.

Who It's For

Firms that need complete IT management without hiring internal staff. You want compliance handled. You want threats blocked. You want problems solved fast.

Starting at $79/user/month

Compliance & Security Controls

- **Multi-factor authentication (MFA) –** Required by FTC. Enforced on all systems.
- **Endpoint Detection and Response (EDR) –** Advanced threat protection on every device.
- **Data encryption –** Files, emails, and transmissions protected with AES-256.
- **Annual risk assessments –** Documented reviews required by FTC.
- **Employee security training –** Quarterly training sessions with completion tracking.
- **Incident response plan –** Documented procedures for breach response.
- **Access controls and monitoring –** Who accessed what, when, and why. Tracked.

IT Support & Management

- **24/7/365 help desk –** Real people answer in under 60 seconds.
- **Software troubleshooting –** Drake, UltraTax, ProSeries, Lacerte specialists.
- **Hardware support –** Computer issues, printer problems, network connectivity.
- **Patch management –** Security updates applied automatically.
- **System monitoring –** Performance issues detected before they impact you.
- **Remote and on-site support –** We fix problems however needed.

Backup & Recovery

- **Immutable offline backups –** Ransomware cannot encrypt or delete them.
- **Daily backup testing –** We verify recoverability. Not just backup completion.
- **Recovery time objective:** 4 hours – Back online fast if disaster strikes.
- **Retention:** 60 days minimum – Multiple restore points available.

Cyber Insurance Compliance

- ✓ **Documentation package –** Everything your carrier asks for during renewals.
- ✓ **Required controls verification –** MFA, EDR, backups proven implemented.
- ✓ **Incident response proof –** Documented plans and testing records.
- ✓ **Security training records –** Employee completion tracked and reported.

Results You Can Measure

- ➤ Threats blocked before they reach users
- ➤ Insurance renewals completed without hassle
- ➤ IT problems resolved in minutes, not days
- ➤ Audits passed without consultants
- ➤ Zero ransomware payments

Complete Hosting and IT Infrastructure

VeritComplete combines everything from VeritSpace and VeritGuard into one package.

You get dedicated private servers that don't crash plus comprehensive IT management that keeps you compliant.

Everything included. 20% less than buying separately.

What You Get

> **All VeritSpace features**
> Private servers. 100% uptime. 35% faster processing.

> **All VeritGuard features**
> Complete IT support. FTC/IRS compliance. 24/7 monitoring.

> **Complete compliance**
> IRS, FTC, and GLBA requirements covered.

> **Single point of contact**
> One team handles hosting, IT, security, and support.

> **Simplified billing**
> One invoice. One contract. No surprises.

Who It's For

Firms that want complete infrastructure without managing multiple vendors. You need hosting that works. IT support that responds. Compliance that's handled.

You get everything for less.

Starting at $249/user/month (Save 20% vs. purchasing VeritSpace + VeritGuard separately)

Most Popular Choice
70% of Verito clients choose VeritComplete. It delivers the most comprehensive protection at the best value.

Avoid IRS and FTC Fines

VeritShield delivers audit-ready Written Information Security Plan (WISP) documentation that meets IRS Publication 4557 and FTC Safeguards Rule requirements.

We handle the paperwork and the process. You stay compliant without hiring consultants.

What You Get

> **Complete WISP documentation**
> Customized to your firm's operations.

> **IRS Publication 4557 compliance**
> Protect your PTIN. File electronically.

> **FTC Safeguards Rule compliance**
> Avoid fines starting at $50,000.

> **Annual review and updates**
> Compliance requirements change. We keep you current.

> **Policy templates**
> Acceptable use, data handling, incident response, training.

> **Audit-ready format**
> Organized documentation that satisfies regulators.

Timeline

We deliver your complete WISP in **5 business days or less.**

Process

01 **Initial assessment**
We review your current infrastructure and practices.

02 **Documentation creation**
We write policies specific to your firm.

03 **Review and refinement**
You approve the final WISP.

04 **Implementation guidance**
We help you put policies into practice.

05 **Annual updates**
We revise documentation as requirements change.

Who It's For

Any firm that needs IRS-compliant WISP documentation. You want to protect your PTIN. You want to avoid FTC fines. You don't want to hire compliance consultants.

$499 **one-time**
(Annual updates included with VeritGuard or VeritComplete)

verito

It just works. **Securely.**

Security Designed for Tax & Accounting Firms

Your clients trust you with their most sensitive information. Social Security numbers. Bank accounts. Financial records.

Here's how we protect it:

Data Residency & Isolation
✓ All data stored in SOC 2 Type II certified US data centers
✓ Private server isolation prevents data mixing with other firms
✓ Physical security: biometric access, 24/7 monitoring, redundant power
✓ Geographic redundancy: data replicated across multiple secure locations

Encryption Everywhere
✓ Data encrypted at rest with AES-256 encryption
✓ Data encrypted in transit with TLS 1.3
✓ Encrypted backups stored offline and immutable
✓ Encryption keys managed separately from data

Access Controls
✓ Multi-factor authentication (MFA) required for all users
✓ Role-based access controls limit data exposure
✓ Session timeouts prevent unauthorized access
✓ All access logged and monitored for anomalies

Backup & Recovery
✓ Immutable offline backups that ransomware cannot reach
✓ Daily backup testing to verify recoverability
✓ 30-day retention with multiple restore points
✓ Recovery time objective: 4 hours maximum

Threat Detection & Prevention
✓ Endpoint Detection and Response (EDR) on all devices
✓ 24/7 security monitoring by trained analysts
✓ Automatic threat blocking before malware executes
✓ Regular vulnerability scanning and patching

Compliance & Auditing
✓ IRS Publication 4557 compliant infrastructure
✓ FTC Safeguards Rule controls implemented and documented
✓ GLBA compliance through private server isolation
✓ Annual third-party security audits completed

Employee Training & Policies
✓ Quarterly security awareness training for all users
✓ Phishing simulation testing and education
✓ Documented policies for data handling and transmission
✓ Incident response procedures tested regularly

The Result

▶ Zero ransomware payments since 2016.

▶ Zero data breaches.

▶ Zero downtime.

▶ Your clients' data stays protected. Your firm stays compliant. You sleep better.

Infrastructure Architecture

Data Centers & Redundancy
- Tier III+ SOC 2 Type II certified facilities
- N+1 redundancy for power, cooling, and network connectivity
- Geographic distribution across multiple US regions
- Automatic failover between data centers in under 60 seconds

Server Infrastructure
- Dedicated private servers per firm (no multi-tenancy)
- Enterprise-grade hardware: Dell PowerEdge, HPE ProLiant
- NVMe SSD storage for maximum IOPS performance
- Memory and CPU resources scaled to firm size and usage

Network Architecture
- Multi-homed BGP network connectivity with carrier diversity
- DDoS protection at network edge (10+ Gbps mitigation capacity)
- Private VLAN segregation per firm
- Sub-100ms latency to 95% of US locations

Storage & Backup
- **Primary storage:** RAID 10 NVMe SSD arrays
- **Backup storage:** Immutable object storage (WORM compliant)
- **Replication:** 3-2-1 backup strategy (3 copies, 2 media types, 1 offsite)
- **Retention:** 30 days standard, custom retention available
- **RPO:** 24 hours | **RTO:** 4 hours

Security Tooling
- **Endpoint protection:** SentinelOne EDR with behavioral AI
- **Network security:** Next-gen firewall (Palo Alto / Fortinet)
- **Email security:** Advanced threat protection with sandbox analysis
- **SIEM:** 24/7 security monitoring with automated response
- **Vulnerability management:** Weekly scanning, 72-hour patching SLA
- **MFA:** Duo Security enforced on all access points

Performance Optimization for Tax Software
- SQL Server database tuning specific to Drake/UltraTax/ProSeries
- Application-aware resource allocation during peak periods
- Automated scaling during tax season (January-April)
- Print spooler optimization for high-volume form printing
- RDP protocol optimization for multi-monitor support

Compliance & Certifications
- SOC 2 Type II (annual audit)
- IRS Publication 4557 compliant infrastructure
- FTC Safeguards Rule controls implemented and documented
- GLBA-compliant data isolation architecture

Monitoring & Alerting
- Real-time infrastructure monitoring (CPU, memory, disk, network)
- Application performance monitoring for tax software
- Security event correlation and automated alerting
- User experience monitoring with synthetic transactions
- Capacity planning alerts prevent resource exhaustion

Service Level Agreements
- **Uptime:** 100% (100% achievement since 2016)
- **Support response:** Sub-60 seconds average
- **Critical incident response:** 15 minutes
- **Backup completion:** 100% success rate
- **Recovery time objective:** 4 hours maximum

Due Diligence Checklist for Evaluating Cloud & IT Vendors

verito
It just works. Securely.

Use this checklist to compare Verito with any competitor.

Compliance & Regulatory

Requirement	Verito	Competitor
IRS Publication 4557 compliant infrastructure	✓	☐
FTC Safeguards Rule controls documented	✓	☐
GLBA-compliant data isolation	✓	☐
SOC 2 Type II certified data centers	✓	☐
Audit-ready WISP documentation provided	✓	☐
Annual risk assessments conducted	✓	☐
Cyber insurance compliance documentation	✓	☐

verito
It just works. Securely.

Security Controls

Requirement	Verito	Competitor
Multi-factor authentication (MFA) enforced	✓	☐
Endpoint detection and response (EDR) deployed	✓	☐
Data encrypted at rest (AES-256)	✓	☐
Data encrypted in transit (TLS 1.3)	✓	☐
Immutable offline backups (ransomware-proof)	✓	☐
Daily backup testing performed	✓	☐
24/7 security monitoring with trained analysts	✓	☐
Incident response plan documented and tested	✓	☐
Employee security training provided quarterly	✓	☐

Performance & Reliability

Requirement	Verito	Competitor
Dedicated private servers (no sharing)	✓	☐
100% uptime guarantee	✓	☐
Demonstrated uptime track record (years)	9 years	_____
Recovery time objective documented	4 hours	_____
Automatic failover capability	✓	☐
Performance optimization for tax software	✓	☐
Scalable resources for tax season	✓	☐

Due Diligence Checklist for Evaluating Cloud & IT Vendors

Tax Software Expertise

Requirement	Verito	Competitor
Specializes exclusively in tax/accounting firms	✓	☐
Drake Tax optimization and support	✓	☐
UltraTax CS optimization and support	✓	☐
ProSeries optimization and support	✓	☐
Lacerte optimization and support	✓	☐
Support team trained on tax software	✓	☐
Tax season preparedness planning	✓	☐

Support & Service

Requirement	Verito	Competitor
24/7/365 support availability	✅	☐
Average response time documented	<60 sec	_____
Support team answers directly (no phone trees)	✅	☐
Migration assistance included	✅	☐
Dedicated account management	✅	☐
Month-to-month contracts (no lock-in)	✅	☐

Due Diligence Checklist for Evaluating Cloud & IT Vendors

Track Record

Requirement	Verito	Competitor
Years in business serving tax/accounting firms	9 years	_____
Number of firms currently served	1,000+	_____
Ransomware payments made by clients	0	_____
Data breaches in company history	0	_____
Client references available	✓	☐

Questions to Ask Any Vendor

1. **How many tax and accounting firms do you currently serve?**
2. **Can you provide the exact IRS and FTC requirements your infrastructure meets?**
3. **What is your documented uptime percentage over the past 3 years?**
4. **How many of your clients have paid ransoms? Had data breaches?**
5. **What is your actual average support response time? (Not advertised-actual.)**
6. **Do you provide cyber insurance compliance documentation?**
7. **Can I speak with 3 current clients who switched from another provider?**
8. **What happens if I need to leave? What's the exit process?**
9. **Do you offer month-to-month contracts or require multi-year commitments?**
10. **How do you handle tax season capacity increases?**

General Questions

Q: What makes Verito different from other IT providers?
A: We only work with tax and accounting firms. We know your software. We know your regulations. We know what you need during tax season. Generic IT providers serve everyone and specialize in nothing.

Q: Do you require long-term contracts?
A: No. We offer month-to-month agreements. You can leave anytime. We keep you because we're good, not because you're locked in.

Q: How long does it take to switch to Verito?
A: Most firms are fully migrated and compliant within 30 days. We handle the entire process. Zero downtime. Zero data loss.

Q: Can I try before I commit?
A: Yes. We offer a 30-day satisfaction guarantee. If you're not happy, we'll help you migrate back to your previous provider at no cost.

Compliance & Security

Q: Are you really IRS compliant?
A: Yes. Our infrastructure meets all IRS Publication 4557 requirements: secure data transmission, access controls, encryption, documented policies, and annual reviews. We provide audit-ready documentation.

Q: What about FTC Safeguards Rule? Does that apply to me?
A: Yes. If you handle consumer financial data (including tax returns), you're covered by FTC Safeguards Rule. We implement all required controls: MFA, EDR, encryption, training, and annual risk assessments.

Q: Will you help with cyber insurance requirements?
A: Yes. We provide the documentation your carrier requires: proof of MFA, EDR, tested backups, incident response plans, and employee training records.

Q: What happens if we get audited?
A: You pass. We provide complete documentation that satisfies IRS and FTC auditors. We've never had a client fail an audit due to infrastructure or security issues.

Q: Have any of your clients been hit by ransomware?
A: Attempts? Yes. Successful attacks? No. We've blocked thousands of threats since 2016. Zero clients have paid ransoms. Zero data lost.

Software & Compatibility

Q: What tax software do you support?
A: Drake, UltraTax CS, ProSeries, Lacerte, CCH Axcess, ProSystem fx, GoSystem, and all major tax and accounting platforms. The only software we don't support is ATX.

Q: Will my software run faster with Verito?
A: Yes. Our clients process tax returns 35% faster on average. We optimize servers specifically for tax software performance.

Q: Can I access my software from anywhere?
A: Yes. Windows, Mac, iOS, Android, Chromebook-any device with internet access. Multi-monitor support included.

Q: What about QuickBooks?
A: We support all versions of QuickBooks Desktop. QuickBooks Online runs independently and doesn't need hosting.

Support & Service

Q: What if I need help at 2 AM during tax season?
A: We answer. 24/7/365 support. Real people. Average response time under 60 seconds. We know tax season doesn't follow business hours.

Q: Do you have phone trees or ticket systems?
A: No. You call, we answer. You email, we respond. No endless menus. No waiting for callbacks.

Q: What if my issue isn't hosting-related?
A: We still help. VeritGuard clients get comprehensive IT support: software issues, computer problems, printer jams, user questions. Not just hosting support.

Q: Can I talk to current clients before deciding?
A: Yes. We'll connect you with firms similar to yours who made the switch. Ask them anything.

Pricing & Billing

Q: What's included in the pricing?
A: Everything. Migration, setup, training, support, compliance documentation, and ongoing management. No hidden fees. No surprise charges.

Q: Do prices increase during tax season?
A: No. Flat monthly rate. Your bill stays the same year-round.

Q: What if I need to add users mid-year?
A: No problem. We prorate new users. You only pay for what you use.

Q: Is there a minimum number of users required?
A: No. We work with solo practitioners and 50+ person firms.

Migration & Onboarding

Q: Will switching cause downtime?
A: No. We migrate outside business hours. Most firms never notice the transition. We've done this hundreds of times.

Q: What do I need to provide?
A: Access to your current environment. List of software and users. We handle everything else.

Q: How long does migration take?
A: Most firms are fully operational on Verito within 48-72 hours. Larger firms may take up to 2 weeks.

Q: What if something goes wrong during migration?
A: We guarantee zero data loss. If any issues arise, we have your complete backup on your previous system until you confirm everything works perfectly.

Technical Questions

Q: Where is my data stored?
A: SOC 2 Type II certified data centers in the United States. We maintain geographic redundancy for disaster recovery.

Q: Who can access my data?
A: Only you and authorized users from your firm. Our staff cannot access client data without explicit permission. All access is logged.

Q: What happens if your data center goes down?
A: Automatic failover to our backup data center. Recovery happens in under 60 seconds. We've maintained 100% uptime since 2016.

Q: How often are backups performed?
A: Daily. We test every backup to verify recoverability. Retention is 30 days minimum.

Q: Are backups protected from ransomware?
A: Yes. Immutable offline backups that ransomware cannot encrypt or delete. Even if your production environment is compromised, backups remain safe.

Case Study 1: Solo Practitioner – PTIN Protection

Challenge: Solo CPA preparing 400+ returns annually needed IRS-compliant WISP documentation. Previous accountant handled compliance, but after retirement, had no documented security policies. Concerned about PTIN revocation.

Solution: VeritShield WISP documentation delivered in 5 business days.

Results:
- Audit-ready WISP completed before IRS deadline
- Protected PTIN and ability to file electronically
- FTC Safeguards Rule compliance achieved as bonus
- Passed cyber insurance renewal requirements

Client Quote: *"I had no idea how much documentation the IRS actually required. Verito handled everything. I can finally sleep at night knowing I'm compliant."*

Case Study 2: 8-Person Firm – Ransomware Recovery

Challenge: Regional accounting firm hit by ransomware attack in February (peak tax season). Previous IT provider couldn't recover data. Hackers demanded $85,000. Firm faced losing 3 months of work and missing tax deadlines.

Solution: Emergency migration to Verito infrastructure with full recovery from immutable backups.

Results:
- Complete data recovery within 4 hours
- Zero ransom paid
- Zero data loss
- Tax season deadlines met
- Implemented comprehensive security controls to prevent future attacks

Measurable Impact:
- Avoided $85,000 ransom payment
- Avoided estimated $200,000 in lost revenue from missed deadlines
- Cyber insurance covered migration costs

Client Quote: *"We thought we were protected. Our old provider said we had backups. When ransomware hit, we learned those backups were encrypted too. Verito saved our business."*

Case Study 3: 15-Person Firm – Performance & Efficiency

Challenge: Growing firm experienced slow Drake Tax performance on shared hosting. Tax preparers waited 45+ seconds for returns to open. Productivity suffered. Considering hiring additional staff to compensate for inefficiency.

Solution: Migration to VeritSpace dedicated private servers optimized for Drake Tax.

Results:
- Returns open in under 5 seconds (90% improvement)
- Processing time reduced from 30 minutes to 20 minutes per return (35% improvement)
- Eliminated need to hire 2 additional preparers
- Firm processed 18% more returns with existing staff

Measurable Impact:
- Saved $120,000 annually in avoided hiring costs
- Generated additional $180,000 revenue from increased capacity
- ROI achieved in 45 days

Client Quote: *"I didn't realize how much time we were wasting until we switched. Our preparers are happier. Our clients get faster turnaround. And we made more money without hiring more people."*

Case Study 4: 25-Person Firm – FTC Compliance & Insurance

Challenge: Mid-size firm facing cyber insurance non-renewal. Carrier required documented MFA implementation, EDR deployment, annual risk assessments, and employee training records. Previous IT provider couldn't produce required documentation.

Solution: VeritGuard implementation with complete FTC Safeguards Rule compliance.

Results:
- All required controls implemented within 30 days
- Complete documentation package delivered to insurance carrier
- Policy renewed without premium increase
- Annual compliance maintenance handled by Verito

Measurable Impact:
- Avoided insurance lapse and potential exposure
- Prevented estimated 40% premium increase from non-compliant renewal
- Achieved FTC compliance ahead of enforcement deadlines

Client Quote: *"Our insurance carrier gave us 60 days to implement MFA, EDR, and training-or they'd drop us. Verito had everything in place in 30 days. They saved our coverage."*

Case Study 5: 35-Person Firm – Complete Infrastructure Replacement

Challenge: Established firm with aging on-premise servers, inconsistent IT support, compliance gaps, and frequent downtime during tax season. Managing three different vendors for hosting, IT support, and compliance consulting.

Solution: VeritComplete implementation replacing all infrastructure and IT vendors.

Results:
- Consolidated three vendors into one
- Eliminated on-premise server maintenance
- Achieved 100% uptime during tax season
- Complete IRS and FTC compliance documentation
- Reduced IT incidents by 85%
- Improved support response time from hours to seconds

Measurable Impact:
- Reduced annual IT costs by 30% ($45,000 savings)
- Eliminated 6 days of tax season downtime (estimated $90,000 lost revenue prevented)
- Freed managing partner from 10+ hours monthly IT management

Client Quote: *"We went from managing three vendors and constant problems to one team that just handles everything. Our only regret is not switching sooner."*

Uptime & Reliability:

- 100% uptime maintained since 2016
- Zero tax season outages across all clients
- Average failover time: 42 seconds

Security & Ransomware:

- 0 successful ransomware attacks
- 0 data breaches
- 0 clients paid ransoms
- 12,000+ threats blocked in 2024

Compliance:

- 100% of clients pass IRS audits
- 100% of clients meet cyber insurance requirements
- Average time to full compliance: 28 days

Performance:

- Average 35% improvement in tax software processing speed
- Average 90% reduction in application load times
- Average 75% reduction in IT support tickets

Support:

- Average response time: 47 seconds
- 24/7/365 availability
- 82% first-call resolution rate

Step 1: Discovery Call (30 minutes)

We'll discuss:
- Your current infrastructure and pain points
- Tax software platforms you use
- Compliance requirements specific to your firm
- Number of users and devices
- Timeline and priorities

You'll receive:
- Custom solution recommendation
- Detailed pricing proposal
- Migration timeline
- Next steps

Step 2: Security Assessment (Complimentary)

We evaluate:
- Current compliance gaps (IRS, FTC, GLBA)
- Existing security controls and vulnerabilities
- Backup and disaster recovery capabilities
- Cyber insurance requirements and coverage

You'll receive:
- Written assessment report
- Compliance checklist with current status
- Recommendations for immediate improvements
- Risk prioritization

Step 3: Proposal & Agreement

We provide:
- Detailed scope of work
- Transparent pricing with no hidden fees
- Service level agreements
- Implementation timeline
- Contract terms (month-to-month, no lock-in)

You decide:
- Review proposal at your pace
- Ask questions-we're here to help
- Compare with other options
- Move forward when ready

Step 4: Migration Planning (1-2 weeks)

We coordinate:
- Detailed migration plan with specific dates and times
- Pre-migration testing to identify potential issues
- Communication plan for your team
- Backup procedures and rollback options if needed

What we need from you:
- Access to current environment
- List of all software applications
- User directory and access permissions
- Preferred migration window (typically after hours or weekends)

What we handle:
- Complete infrastructure setup
- Data migration and verification
- Software installation and configuration
- Security controls implementation
- Testing and validation

Step 5: Migration Execution (24-72 hours)

Timeline:
- **Small firms (1-5 users):** 24 hours
- **Mid-size firms (6-20 users):** 48 hours
- **Larger firms (20+ users):** 48-72 hours

During migration:
- We work outside your business hours
- Your current system remains operational as backup
- We migrate data, test functionality, verify performance
- You approve cutover only after confirming everything works

We guarantee:
- Zero data loss
- Zero business disruption
- Complete functionality before cutover
- Rollback option if any issues arise

Step 6: Training & Onboarding (1 week)

User training:
- Remote access setup for all devices
- Security best practices and compliance requirements
- How to access support
- Common tasks and workflows

Admin training:
- User management and access controls
- Backup verification and testing
- Security monitoring and alerts
- Billing and account management

Ongoing support:
- 24/7/365 help desk available immediately
- Dedicated account manager assigned
- Regular check-ins during first 90 days
- Compliance documentation delivered

Step 7: Optimization & Ongoing Management

First 30 days:
- Performance monitoring and tuning
- User feedback collection and issue resolution
- Compliance documentation finalization
- Success metrics baseline established

Ongoing:
- Continuous monitoring and threat protection
- Quarterly security training for users
- Annual compliance reviews and updates
- Regular account reviews with your dedicated manager
- Proactive capacity planning for tax season

What Our Clients Say About Onboarding

"I was nervous about switching during tax season, but Verito handled everything. We migrated over a weekend. Monday morning, everything just worked."
 - 12-person CPA firm

"The migration was easier than setting up a new phone. They did everything. We didn't have to think about it."
 - Solo practitioner

"We've switched IT providers three times. This was the only time we didn't lose data, experience downtime, or regret the decision."
 - 8-person accounting firm

30-Day Satisfaction Guarantee

Try Verito risk-free. If you're not completely satisfied within 30 days, we'll help you migrate back to your previous provider at no cost.

No questions asked. No hard feelings.

We keep clients because we're good, not because they're locked in.

Ready to Get Protected?

Schedule a Discovery Call
30-minute consultation to discuss your firm's needs
📅 **Book:** https://calendly.com/verito/cdc

Request a Security Assessment
Complimentary evaluation of your compliance gaps and risks
✉ **Email:** sales@verito.com

Get a Custom Quote
Detailed proposal based on your specific requirements
📞 **Call:** 1-855-583-7486

Talk to Current Clients
Speak with firms similar to yours who made the switch
💬 **Request:** 1-855-583-7486

Contact Information

Verito Technologies

Phone: 1-855-583-7486 | **Email:** sales@verito.com | **Web:** www.verito.com

Connect With Us

LinkedIn: @veritotech | **Twitter:** @veritotech | **YouTube:** @verito-technologies

It just works. Securely.

Common Next Steps

If you're exploring options:
Schedule a discovery call to discuss your firm's specific needs and challenges.

If you need compliance documentation:
Request our complimentary security assessment to identify gaps.

If you're ready to switch:
Contact us for a detailed migration plan and proposal.

If you want to compare vendors:
Use our Due Diligence Checklist (page 12) to evaluate all options fairly.

If you're not sure what you need:
That's okay. We'll help you figure it out. No pressure. No sales pitch.

Why Firms Choose Verito

✓ **We only work with tax and accounting firms**

✓ **100% uptime since 2016**

✓ **Zero ransomware payments**

✓ **Sub-60-second support response**

✓ **Complete IRS/FTC compliance**

✓ **Month-to-month contracts**

✓ **30-day satisfaction guarantee**

It just works. Securely.