

# Security Documentation

National Software, Inc. is an established U.S. based developer of tax information reporting software and services, operating since 1989. We are committed to maintaining confidentiality, integrity, and availability of client data through a mature, independently audited information security program.

## Security & Compliance Framework

Our information security program is aligned with:

- **AICPA SOC 2** Trust Services Criteria for **Security, Availability, and Confidentiality**
- IRS Publication 4557: Safeguarding Taxpayer Data

National Software is assessed annually under the SOC 2 Type II framework, demonstrating the ongoing effectiveness of our Security, Availability, and Confidentiality controls.

## Information Security Program Highlights

### Hosting and Infrastructure

Our SaaS systems are hosted on reputable third-party cloud providers with strong security postures, including Render (application hosting) and Supabase (database and authentication). These providers undergo their own independent security assessments, and all data is encrypted both in transit (TLS 1.2+) and at rest (AES-256).

### Data Protection & Retention

Customer data is stored in secure, access-controlled environments and is used solely for the purpose of fulfilling the contracted service. Data access is logged and monitored in accordance with our incident response and audit procedures.

### Access Control & Authentication

All internal systems enforce multi-factor authentication (MFA), strong password policies, and least privilege access. Access is reviewed regularly and immediately revoked upon termination of employment or contract.

### Monitoring & Incident Response

We maintain a documented Incident Response Plan and utilize real-time monitoring tools to detect, investigate, and mitigate potential security events. All security incidents are reviewed by the Chief Information Security Officer.

### Vendor & Subprocessor Oversight

Third-party service providers undergo security and privacy due diligence prior to engagement. We maintain written agreements outlining confidentiality and data handling responsibilities.

### Business Continuity & Backup

All production systems and databases are backed up daily, with periodic disaster recovery testing to validate restoration processes.

### Regulatory Compliance & Privacy

We comply with relevant privacy and data protection requirements, including IRS Safeguards, CCPA, and GDPR principles where applicable based on data residency and client scope. National Software, Inc. also maintains a Business Associate Agreement (BAA) with Google Workspace for handling covered information.

### Insurance Coverage

We maintain Cyber Liability, Technology Errors & Omissions, and Commercial General Liability insurance policies.

### HECVAT

While we recognize that many institutions use the HECVAT framework, National Software, Inc. does not complete third-party or custom security questionnaires. The below SOC 2 attestation confirmation and summary of our security controls provide the verified assurance necessary to evaluate our compliance posture.



## Attestation Status Confirmation

**THIS IS TO CONFIRM THAT**  
National Software Inc.

**WAS ISSUED AN ATTESTATION REPORT FOR**  
SOC 2 Type 2  
Security, Availability, and Confidentiality

**FOR THE PERIOD**  
1 June 2025 to 30 November 2025

**FOR THE SCOPE OF**  
Software as a Service System

**REPORT ISSUANCE DATE**  
For additional information, we refer you to the entire report, which includes our signed opinion dated 18 December 2025.

*Disclaimer*

*This letter is provided solely to confirm certain factual matters as requested and does not constitute an opinion or provide any assurance beyond that expressed in our service auditors' report. Our engagement was conducted in accordance with the attestation standards established by the AICPA, and the scope of our work was limited to those procedures necessary to complete the attestation engagement, which is subject to inherent limitations. We have not performed any procedures beyond those described in our service auditors' report, and we do not express any opinion or provide any assurance on any other matters.*

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