

FREELANCER SECURITY POLICY & SETUP WORKSHEET

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Set up the protections below once, then keep them running. Share the relevant parts with clients to show you take their data seriously.

1. Accounts & Passwords

- Password manager installed; strong unique passwords everywhere
- Two-factor authentication on email, banking, and client tools

2. Network

- VPN installed; ON whenever on public / untrusted Wi-Fi

VPN service / renewal date: _____

3. Devices

- Auto-updates on for OS, browser, and apps
- Full-disk encryption + strong screen lock on every device
- Regular backups configured AND tested

4. Client Data Handling

- Collect only needed data; delete when the project ends
- Store encrypted; share via secure tools (not email attachments)

Where client data is stored (tool / location): _____

- Follow each client contract data requirements

5. Breach Plan

Who to notify + how fast (per contract / state law): _____

- Steps written: contain -> assess -> notify -> document

6. Expenses (deductible)

Security tools + subscriptions to track for tax deductions: _____

INSTRUCTIONS FOR USE

Complete the bracketed fields, delete anything that does not apply, sign where required, and keep with your records. This template is provided for informational purposes only and does not constitute legal advice. Laws vary by state and change over time. Have an attorney review your completed document before relying on it. ClearLegalTips.com is not a law firm.