

Cathy Bendel

From: Jason Miller [j.miller@smithschafer.com]
Sent: Wednesday, September 09, 2015 3:32 PM
To: Cathy Bendel
Subject: Best Practices for Releasing Documents

Cathy –

Per our phone conversation, this is a follow-up regarding best practices for releasing documents. As we discussed, it depends upon the nature of the document, but we typically recommend (and our general internal policy) is to send documents in static format (e.g. published documents, documents in pdf form, etc.) rather than sending out the documents in their source format (e.g. Word, Excel, etc.).

We do this especially when our name or report is associated with the document. This is important because documents in their source format are easily modified and can then be disseminated as though the modified information came directly from us, even though we probably did not approve of or review the modifications.


This policy will not ensure information you issue will not be modified, but it does provide a level of protection from unauthorized modifications being presented as your information.

I hope this helps. Please let me know if you have any questions or if you would like to discuss further.

Best regards,

Jason Miller | Principal | CPA

651-770-8414 | j.miller@smithschafer.com

Connect with Smith Schafer |    

Consistent Service. Genuine Solutions.

