

Prepare the vendor conversation

Record questions and evidence to request. This is not a compliance certification.

Type in the fields or print. Save your copy. No answers are sent to Redbroch.

Use non-sensitive descriptions. Do not enter client records or credentials.

01 Where would information travel and remain?

Ask about processing, storage, logs, backups, provider accounts and retention.

02 Who would have access, and from where?

List people, roles and services to confirm. Note permissions and access-log visibility.

03 What happens when the work ends?

Ask about access removal, return/deletion, backup handling and operating documentation.

04 What remains unconfirmed before access?

List missing evidence, subprocessor changes and questions for your IT or legal advisers.

Discussion aid only. Not tax, legal or security advice.

Companion article: redbroch.com/before-giving-a-vendor-access.html