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in progress

A background image of a modern office with large windows. Several people are working at desks with computers. One man is standing and talking to a seated woman. In the foreground, there is a grey sofa with colorful patterned cushions.

# Tax Traders and Taxi financial services:

## BSI certification to ISO/IEC 27001:2022 Information Security Management

A BSI case study



With today's constantly evolving information security risks, New Zealand financial technology companies Tax Traders and Taxi wanted to affirm their commitment to delivering the highest standards of security for their clients. They have achieved this goal – and wider business benefits – through BSI certification to ISO/IEC 27001:2022.

## THE CLIENTS: Tax Traders and Taxi

Launched in 2012 by entrepreneurs Nicola and Josh Taylor, Auckland-based financial technology company Tax Traders is a leading tax pooling provider in New Zealand.

Tax pooling allows New Zealand taxpayers to match the timing of their provisional tax payments to their business cash flow. It also enables them to pool payments in an account, facilitating the selling and buying of tax at favourable interest rates.

Tax Traders' advanced platform is aimed at accountants across New Zealand, who recommend the use of tax pooling to taxpayers to manage their provisional tax obligations. The platform provides accountants with smart tools designed to simplify their provisional tax workflow, so they can provide their taxpayer clients with payment flexibility. It is fully integrated with Inland Revenue (IRD), with Tax Traders established as an approved digital services provider.

Nicola and Josh Taylor want to see the benefits of tax pooling available to all taxpayers, not just a select few. In 2024, they launched a sibling company, Taxi, specifically to enhance SMEs' access to tax pooling solutions, enabling them to use their provisional tax payments to secure access to working capital at about half the rate of a large bank overdraft.





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Tom Stehlik,  
Chief Information Officer  
Tax Traders and Taxi

## The Challenge: To demonstrate robust information security management

As leading digital services providers, Tax Traders and Taxi take data security extremely seriously. The companies ensure that whenever accountants and taxpayers transact with them, they and the IRD feel safe in the knowledge that sensitive information is being effectively managed and safeguarded.

Tom Stehlik, Chief Information Officer for Tax Traders and Taxi, explains: "We recognize that becoming world-class companies comes with the duty to repay our clients' trust by protecting their information to the highest standard. We need to demonstrate that we adopt the strongest possible information security posture, so their personal and commercially sensitive data is not compromised."

Stehlik is equally aware of today's constantly evolving digital security and data privacy threats. When he joined the business in January 2024, he set out to meet a key challenge for the two companies: "To show that we are using robust, internationally recognized best practices to manage and protect information against these threats."

## The Solution: BSI certification to ISO/IEC 27001:2022

The solution for Tax Traders and Taxi lay in BSI certification to ISO/IEC 27001:2022. Globally accepted as the 'gold standard' for information security management systems (ISMS), ISO/IEC 27001 provides a structured framework for protecting sensitive information, managing risks, and ensuring confidentiality, integrity, and availability of data.

The standard's key features include risk assessment and treatment, security policies, asset management, access control, incident response, and continuous improvement. It covers people, processes, and technology, ensuring security is embedded across the organization.

During 2024, Stehlik steered the companies successfully through to BSI certification, which meant undergoing BSI's thorough audit process to ensure their ISMS met all the requirements of ISO/IEC 27001:2022. For example, Tax Traders and Taxi had to show that they had systematically examined information security risks to their business and implemented comprehensive controls to address those risks, as well as adopting an overarching management process to ensure that the controls continue to meet ongoing needs.



# The Benefits

By demonstrating the companies' compliance with best practices, BSI certification to ISO/IEC 27001 contributes to stakeholder trust and meeting regulatory requirements, while strengthening resilience against cyber threats.

"Our BSI certification is very important for us," says Stehlik. "It validates the information systems and processes we've developed to safeguard financial and personal information in an increasingly challenging digital environment."

He continues. "While it has always been a top priority to ensure our clients' information is safeguarded, now we can prove it. Our systems have undergone thorough vetting by BSI, and our BSI certification makes us New Zealand's first, and so far only, ISO/IEC 27001-certified tax pooling provider."

Ultimately, BSI certification boosts the companies' appeal in their chosen markets. "Our clients and the IRD can see we've gone above and beyond other providers," adds Stehlik.

Looking ahead, Tax Traders and Taxi do not see certification as the end of their data protection journey. It is a continuation of ongoing system security work to reassure clients that they maintain a robust ISMS to allow secure delivery of their groundbreaking solutions. Rather than a compliance checkbox, it is an enabler of trust, resilience, and continuous improvement.

Stehlik concludes: "As a responsible business, our approach to security goes beyond technology – it's embedded in our culture, with BSI certification to ISO/IEC 27001 at the heart of what we do."

## Why BSI

Tom Stehlik comments: "We researched possible certification partners and BSI came top of our list. We chose them because we wanted the best. We wanted our ISMS to be audited by someone who is trusted and who would bring a level of expertise and rigour that goes beyond compliance checking – and that's exactly what we get from BSI."

