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To Enroll, Please Call:
1-800-939-4170
Or Visit:
[https://app.idx.us/account-
creation/protect](https://app.idx.us/account-creation/protect)
Enrollment Code: <<XXXXXXXXXX>>

<<First Name>> <<Last Name>>
<<Address1>> <<Address2>>
<<City>>, <<State>> <<ZIP>>

June 17, 2021

Notice of Potential Security Incident

Dear <<First Name>> <<Last Name>>,

I wanted to follow up my recent call about the potential data security incident that may have impacted your personal information. I value and respect the privacy of your information, and sincerely apologize for any concern or inconvenience this may cause you. This letter contains information about steps you can take to protect your information, and resources I am making available to help you.

What happened?

As you know, in late April 2021, while attempting to file your tax return, I received an alert that a return had already been filed. I contacted the IRS and my tax software provider and hired independent computer forensic investigators to determine if there was a compromise of my network or your data. The investigation is ongoing but to date, the investigators have not identified any signs of data access or exfiltration from my network. If this changes, I will let you know. In the meantime, I wanted to let you know about this investigation now before it is complete so you can take steps to protect yourself.

What Information was involved?

Information stored in my system includes data related to tax returns, such as your name, address, Social Security number, bank account number if you provided that to me, and other tax related information could be involved.

What we are doing:

If you have received a Letter 4883C from the IRS indicating that they received a suspicious tax return with your name on it, you should follow the instructions on that letter to verify your identity with the IRS. Respond immediately to any IRS written notice. **The IRS will not contact you via phone.** Once you verify your identity, you can advise the IRS that you did not file the suspicious tax return. Additionally, you may be asked to file a paper return for the current filing season. I can assist you with filing a paper return and filling out and submitting IRS Form 14039, which we will attach to your paper filing.

If you have not received a Letter 4883C from the IRS, you should fill out and submit IRS Form 14039, which is available at IRS.gov. I can provide you with a copy of that form and assist you with filling it out.

Finally, while the investigation is ongoing, I have also arranged for you to receive identity theft protection services through IDX, the data breach and recovery services expert. IDX identity protection services include: 12 months of credit and CyberScan monitoring, a \$1,000,000 insurance reimbursement policy, and fully managed id theft recovery services. With this protection, IDX will help you resolve issues if your identity is compromised.

What you can do:

It is always a good idea to review your bank account and other financial statements, and immediately contact your financial institution if you identify suspicious activity. We encourage you to enroll in free IDX identity protection services by going to <https://app.idx.us/account-creation/protect> or calling 1-800-939-4170 and using the Enrollment Code provided above. IDX representatives are available Monday through Friday from 6 am - 6 pm Pacific Time. Please note the deadline to enroll is September 17, 2021.

You will find detailed instructions for enrollment on the enclosed Recommended Steps document. Also, you will need to reference the enrollment code at the top of this letter when calling or enrolling online, so please do not discard this letter.

If you received a fraudulent deposit from the IRS into your bank account, the IRS has recommended the following:

1. Do not spend this money, as it must be returned to the IRS.
2. Contact your bank's fraud department and let them know that the money was deposited as a result of a fraudulent tax filing, and that the deposit should be reversed as soon as possible.
3. Do not return the money by check. The most reliable way for the money to be returned and credited to you is to instruct your bank to reverse the deposit.
4. If you have any issues with your bank and the return of the money, please contact me.

If you previously contacted the IRS and did not have a resolution, contact the IRS for specialized assistance at 1-800-908-4490. The IRS has teams available to assist. You should also visit <https://www.irs.gov/individuals/how-irs-id-theft-victim-assistance-works> for more information.

The security of your information is of the utmost importance to me. Once the forensic investigation is completed, I will be working closely with the investigators to identify additional security measures to further enhance the security of my system. Out of an abundance of caution, I also provided your name and Social Security number to the IRS so they could apply any protections they might have available as well.

Other important information:

If you have any questions or concerns, please call 1-800-939-4170 Monday through Friday, 6 am - 6 pm Pacific Time. Your trust is a top priority for me, and I deeply regret any inconvenience or concern that this matter may cause you.

Sincerely,



Steve McFadden, CPA



Recommended Steps to Help Protect Your Information

1. Website and Enrollment. Go to <https://app.idx.us/account-creation/protect> and follow the instructions for enrollment using your Enrollment Code provided at the top of the letter.

2. Activate the credit monitoring provided as part of your IDX identity protection membership. The monitoring included in the membership must be activated to be effective. Note: You must have established credit and access to a computer and the internet to use this service. If you need assistance, IDX will be able to assist you.

3. Review your credit reports. We recommend that you remain vigilant by reviewing account statements and monitoring credit reports. Under federal law, you also are entitled every 12 months to one free copy of your credit report from each of the three major credit reporting companies. To obtain a free annual credit report, go to www.annualcreditreport.com. You may wish to stagger your requests so that you receive a free report by one of the three credit bureaus every four months.

If you discover any suspicious items and have enrolled in IDX identity protection, notify them immediately by calling or by logging into the IDX website and filing a request for help.

If you file a request for help or report suspicious activity, you will be contacted by a member of our ID Care team who will help you determine the cause of the suspicious items. In the unlikely event that you fall victim to identity theft as a consequence of this incident, you will be assigned an ID Care Specialist who will work on your behalf to identify, stop and reverse the damage quickly.

You should also know that you have the right to file a police report if you ever experience identity fraud. Please note that in order to file a crime report or incident report with law enforcement for identity theft, you will likely need to provide some kind of proof that you have been a victim. A police report is often required to dispute fraudulent items. You can report suspected incidents of identity theft to local law enforcement or to the Attorney General.

4. Place Fraud Alerts with the three credit bureaus. If you choose to place a fraud alert, we recommend you do this after activating your credit monitoring. You can place a fraud alert at one of the three major credit bureaus by phone and also via Experian's or Equifax's website. A fraud alert tells creditors to follow certain procedures, including contacting you, before they open any new accounts or change your existing accounts. For that reason, placing a fraud alert can protect you, but also may delay you when you seek to obtain credit. The contact information for all three bureaus is as follows:

Credit Bureaus

Equifax Fraud Reporting
1-866-349-5191
P.O. Box 105069
Atlanta, GA 30348-5069
www.equifax.com

Experian Fraud Reporting
1-888-397-3742
P.O. Box 9554
Allen, TX 75013
www.experian.com

TransUnion Fraud Reporting
1-800-680-7289
P.O. Box 2000
Chester, PA 19022-2000
www.transunion.com

It is necessary to contact only ONE of these bureaus and use only ONE of these methods. As soon as one of the three bureaus confirms your fraud alert, the others are notified to place alerts on their records as well. You will receive confirmation letters in the mail and will then be able to order all three credit reports, free of charge, for your review. An initial fraud alert will last for one year.

Please Note: No one is allowed to place a fraud alert on your credit report except you.

5. Security Freeze. By placing a security freeze, someone who fraudulently acquires your personal identifying information will not be able to use that information to open new accounts or borrow money in your name. You will need to contact the three national credit reporting bureaus listed above to place the freeze. Keep in mind that when you place

the freeze, you will not be able to borrow money, obtain instant credit, or get a new credit card until you temporarily lift or permanently remove the freeze. There is no cost to freeze or unfreeze your credit files.

6. You can obtain additional information about the steps you can take to avoid identity theft from the following agencies. The Federal Trade Commission also encourages those who discover that their information has been misused to file a complaint with them.

California Residents: Visit the California Office of Privacy Protection (www.oag.ca.gov/privacy) for additional information on protection against identity theft.

Kentucky Residents: Office of the Attorney General of Kentucky, 700 Capitol Avenue, Suite 118 Frankfort, Kentucky 40601, www.ag.ky.gov, Telephone: 1-502-696-5300.

Maryland Residents: Office of the Attorney General of Maryland, Consumer Protection Division 200 St. Paul Place Baltimore, MD 21202, www.oag.state.md.us/Consumer, Telephone: 1-888-743-0023.

New Mexico Residents: You have rights pursuant to the Fair Credit Reporting Act, such as the right to be told if information in your credit file has been used against you, the right to know what is in your credit file, the right to ask for your credit score, and the right to dispute incomplete or inaccurate information. Further, pursuant to the Fair Credit Reporting Act, the consumer reporting agencies must correct or delete inaccurate, incomplete, or unverifiable information; consumer reporting agencies may not report outdated negative information; access to your file is limited; you must give your consent for credit reports to be provided to employers; you may limit “prescreened” offers of credit and insurance you get based on information in your credit report; and you may seek damages from a violator. You may have additional rights under the Fair Credit Reporting Act not summarized here. Identity theft victims and active duty military personnel have specific additional rights pursuant to the Fair Credit Reporting Act. You can review your rights pursuant to the Fair Credit Reporting Act by visiting www.consumerfinance.gov/f/201504_cfpb_summary_your-rights-under-fcra.pdf, or by writing Consumer Response Center, Room 130-A, Federal Trade Commission, 600 Pennsylvania Ave. N.W., Washington, D.C. 20580.

New York Residents: the Attorney General may be contacted at: Office of the Attorney General, The Capitol, Albany, NY 12224-0341; 1-800-771-7755; <https://ag.ny.gov/>.

North Carolina Residents: Office of the Attorney General of North Carolina, 9001 Mail Service Center Raleigh, NC 27699-9001, www.ncdoj.gov, Telephone: 1-919-716-6400.

Oregon Residents: Oregon Department of Justice, 1162 Court Street NE, Salem, OR 97301-4096, www.doj.state.or.us/, Telephone: 877-877-9392

Rhode Island Residents: Office of the Attorney General, 150 South Main Street, Providence, Rhode Island 02903, www.riag.ri.gov, Telephone: 401-274-4400

All US Residents: Identity Theft Clearinghouse, Federal Trade Commission, 600 Pennsylvania Avenue, NW Washington, DC 20580, www.consumer.gov/idtheft, 1-877-IDTHEFT (438-4338), TTY: 1-866-653-4261.