

# EQUITABLE TAX SERVICE

22 Trixie Drive, Livermore, CA 94550  
Telephone / Fax: (925) 373-0153

May 16, 2017

**REDACTED**

VIA EMAIL ONLY

RE: NOTICE OF DATA BREACH

Dear **REDACTED**

We are regretfully contacting you because we have learned of a data security incident that may have involved some of your personal information. We value your commitment to Equitable Tax Service ("ETS") and respect your privacy. As a result of this concern, and as a precautionary measure, we wanted to notify you of a data security incident and inform you about measures you can take to protect against any misuse of your personal information.

## What Happened

On the evening of March 16, 2017, Jill Dykes, the owner of ETS, experienced issues logging into her Comcast email account, which she used for professional services on behalf of ETS. The next day, Ms. Dykes contacted the technical support department, who informed Ms. Dykes that the password to her email account had been changed the previous day. This password change occurred without Ms. Dykes' knowledge or consent, indicating potential unauthorized access to her email account and a potential unauthorized disclosure of the data contained in that email account. This incident occurred despite ETS spending time and resources, including over the last 6 months, to maximize security of ETS information.

## What Information Was Involved

Based on our initial review, the email account that was potentially compromised may have contained some of your personal information used for providing tax advice and/or preparing your tax returns, including your name, address, Social Security number, and wage information. However, we are not currently aware of any misuse of your personal information.

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### What We Are Doing

Upon learning of the data security incident, ETS promptly engaged legal counsel and reported the incident to the appropriate authorities, including law enforcement, the California Franchise Tax Board, and the Internal Revenue Service ("IRS"). As a precaution, and to protect your information, the IRS may employ additional monitoring tools for your account this year to prevent any fraudulent tax returns. Further, ETS had its systems professionally scanned to confirm that no additional future risk exists via embedded viruses or malware; the scan confirmed that the ETS systems are clean.

Moreover, as noted in a prior letter, ETS has recently switched over to using the ShareFile system for secure file sharing and transfer. However, you may have continued to send sensitive information via direct email. For your protection, please do not send sensitive information via direct email; please request a secure link, which we will forward to you.

### What You Can Do

In light of this security incident, we recommend that you remain vigilant by reviewing your account statements and credit reports closely. If you detect any suspicious activity on a financial account, you should notify the financial institution responsible for the account immediately. You should also promptly report any fraud or suspicious financial activities to law enforcement authorities, your state's Attorney General's office, and/or the Federal Trade Commission (the "FTC"). To submit a complaint to the FTC, visit <[ftc.gov/idtheft](http://ftc.gov/idtheft)> or call (877) 438-4338. Complaints submitted to the FTC will be included in the FTC's Identity Theft Data Clearinghouse, which will be accessible to law enforcement throughout the country. You may also wish to review information provided by the California Attorney General on how to avoid identity theft at <[oag.ca.gov/idtheft](http://oag.ca.gov/idtheft)>.

Additionally, you may want to consider placing a fraud alert on your credit report. An initial fraud alert is free, and it will stay on your credit file for at least 90 days. Such an alert will inform creditors of possible fraudulent activity in connection with your credit, and it will also request that creditors contact you before opening any accounts in your name. To place a fraud alert on your credit report, contact any of the three major credit reporting agencies using the contact information below:

- **Equifax:** (800) 525-6285; <[www.equifax.com](http://www.equifax.com)>; P.O. Box 740241, Atlanta, GA 30374.
- **Experian:** (888) 397-3742; <[www.experian.com](http://www.experian.com)>; P.O. Box 9532, Allen, TX 75013.
- **TransUnion:** (800) 680-7289; <[www.transunion.com](http://www.transunion.com)>; Fraud Victim Assistance Division, P.O. Box 2000, Chester, PA 19022.

We recommend that you periodically review your credit report from one or more of the national credit reporting companies identified above. You can obtain a free copy of your credit report online at [www.annualcreditreport.com](http://www.annualcreditreport.com), by calling toll-free (877) 322-8228, or by mailing an Annual Credit Report Request Form (available at <[annualcreditreport.com](http://annualcreditreport.com)>) to: Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA 30348-5281. When you receive your credit reports, review them carefully. Look for accounts or creditor inquiries that you did not initiate or do not recognize. Look for information, such as home address and

Social Security number, that is not accurate. If you see anything you do not understand, call the credit reporting agency at the number on the report.

As an added precaution, ETS has arranged to have Lifelock protect your identity for 12 months at no cost to you. The instruction letter for enrolling in Lifelock's identity protection services is enclosed, and you will have until June 30, 2017 to enroll. If a problem arises, simply contact Lifelock and a dedicated investigator will assist you addressing harms caused by the data security incident, including assistance in recovering any financial losses and restoring your credit.


We encourage you to take advantage of the credit-monitoring service for the next year. We recommend that you regularly review your financial accounts and immediately report any suspicious activity. If you suspect misuse of your personal information based upon this incident, you should immediately contact us, law enforcement, the FTC, and/or your state's Attorney General's office.

For More Information

ETS sincerely regrets that this incident occurred, and we will immediately notify you if there are any developments in our investigation. For further information and assistance, please contact Jill Dykes at (925) 373-0153 or [jill.dykes@comcast.net](mailto:jill.dykes@comcast.net) between 9:00 a.m.- 5:00 p.m. PST Monday through Friday.

Sincerely,

EQUITABLE TAX SERVICES



Jill Dykes, Owner

*Enclosure*

May 16, 2017

Re: Instructions for LifeLock

Dear Client:

**Equitable Tax Service** has retained LifeLock to provide one (1) year of complimentary LifeLock Standard™ identity theft protection.

**To activate your membership and get protection immediately at no cost to you:**

1. Go to [www.lifelock.com](http://www.lifelock.com). Click on the red START MEMBERSHIP button.
2. You will be taken to another page where, below the three protection plan boxes, you can enter the promo code: **ETS317** and click the **APPLY** button.
3. On the next page, enter your Member ID. (Your Member ID is your first name last name plus 5-digit zip code. Ex. JOHNNORTON12345.)
4. Click the red START YOUR MEMBERSHIP button.
5. You will receive a confirmation email (be sure to follow all directions in this email).

**You will have until 06/30/2017 to enroll in this service.**

Once you have completed the LifeLock enrollment process, the services will be in effect immediately. Your LifeLock Standard™ membership includes:

- ✓ LifeLock Identity Alert® System†
- ✓ Black Market Website Surveillance
- ✓ Address Change Verification
- ✓ LifeLock Privacy Monitor
- ✓ Live, U.S.-based Member Service Support
- ✓ Identity Restoration Support
- ✓ Dollar for Dollar Stolen Funds Reimbursement up to \$25,000 for LifeLock Standard™‡

LifeLock backs up its services with its \$1 Million Service Guarantee‡.

Please rest assured the well-being of our clients is our highest priority. We apologize for any inconvenience this incident may cause you, and thank you for your understanding and cooperation.

No one can prevent all identity theft.

† LifeLock does not monitor all transactions at all businesses.

‡ Stolen Funds Reimbursement benefits and Service Guarantee benefits for State of New York members are provided under a Master Insurance Policy underwritten by State National Insurance Company. Benefits for all other members are provided under a Master Insurance Policy underwritten by United Specialty Insurance Company. Under the Stolen Funds Reimbursement, LifeLock will reimburse stolen funds up to \$25,000 for Standard membership, up to \$100,000 for Advantage membership and up to \$1 million for Ultimate Plus membership. Under the Service Guarantee LifeLock will spend up to \$1 million to hire experts to help your recovery. Please see the policy for terms, conditions and exclusions at [LifeLock.com/legal](http://LifeLock.com/legal).