



(Date)

(Name)

(Address)

(City, State, Zip)

Subject: Notice of Data Breach

Dear (Name):

We are writing to inform you of a data security incident that may have exposed your personal information. We take the protection and proper use of your information very seriously. This is why we are contacting you, providing you credit monitoring and identity theft restoration services, and informing you about additional steps that can be taken to guard against identity theft.

**What happened?** We recently learned that a number of our clients had 2015 tax returns filed in their names without their authorization. We immediately engaged a digital forensics firm to help us investigate whether our information system had been accessed without authorization. On March 15, 2016 we received confirmation from the digital forensics firm that some client information may have been accessed without our authorization. It is possible that your tax return file may have been one of the files accessed.

**What Information Was Involved?** The information included your name, address, date of birth, Social Security number and bank account number if electronic deposit or payment options were used with your tax returns.

**What Are We Doing?** We are notifying you of the incident, providing you information about steps you can take to further guard against identity theft, and will provide you credit monitoring and identity theft restoration services for 24 months to protect your identity. We are also working with the Internal Revenue Service/Criminal Investigation and the Federal Bureau of Investigation to protect your tax information and identify the perpetrator, and will provide whatever cooperation is necessary to do so. The security of our system has been enhanced, making it more difficult for similar incidents to occur in the future. Further enhancements will be implemented based on the digital forensic firm's findings and recommendations.

**What You Can Do:** To help protect your identity, we have arranged to have AllClear ID protect your identity for 24 months at no cost to you. The following identity protection services start on the date of this notice and you can use them at any time during the next 24 months:

AllClear SECURE services: The team at AllClear ID is prepared and standing by if you need identity repair assistance. This service is automatically available to you with no enrollment required. If a problem arises, simply call 877-676-0379 and a dedicated investigator will help recover financial losses, restore your credit and make sure your identity is returned to its proper condition.

AllClear PRO services: This service offers additional layers of protection including credit monitoring and a \$1 million identity theft insurance policy. To use the PRO service, you will need to provide your personal information to AllClear ID. You may sign up online at [enroll.allclearid.com](http://enroll.allclearid.com) by using the following redemption code: (pending from AllClear ID). Please note that additional steps may be required by you in order to activate your phone alerts.

**For More Information:** Further information about how to guard against identity theft appears on the following pages. Should you have any questions, please contact us at 530.207.6434, [mullrich@udcpas.com](mailto:mullrich@udcpas.com), or [tdelevati@udcpas.com](mailto:tdelevati@udcpas.com). Please accept our sincere apologies and know that we deeply regret any worry or inconvenience this may cause you.

Sincerely,



Mark Ullrich & Tony Delevati  
Ullrich Delevati CPAs

### **Information about Identity Theft Prevention**

It is recommended that you remain vigilant for any incidents of fraud or identity theft by regularly reviewing credit card account statements and your credit report for unauthorized activity. You may obtain a free copy of your credit report from the following national consumer reporting agencies or from the Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA, 30348-5281, 1-877-322-8228, [www.annualcreditreport.com](http://www.annualcreditreport.com):

**Equifax:** P.O. Box 105139, Atlanta, Georgia 30374-0241, 1-800-685-1111, [www.equifax.com](http://www.equifax.com)

**Experian:** P.O. Box 2002, Allen, TX 75013, 1-888-397-3742, [www.experian.com](http://www.experian.com)

**TransUnion:** P.O. Box 6790, Fullerton, CA 92834-6790, 1-800-916-8800, [www.transunion.com](http://www.transunion.com)

You can obtain information from the consumer reporting agencies, the **Federal Trade Commission (FTC)**, or your respective state Attorney General about steps you can take toward preventing identity theft. You may report suspected identity theft to local law enforcement, the FTC, or your respective Attorney General. The FTC may be contacted at FTC, **Consumer Response Center**, 600 Pennsylvania Avenue, NW, Washington, DC 20580, 1-877-438-4338, [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft).

**Fraud Alerts:** There are also two types of fraud alerts that you can place on your credit report to put your creditors on notice that you may be a victim of fraud: an initial alert and an extended alert. You may ask that an initial fraud alert be placed on your credit report if you suspect you have been, or are about to be, a victim of identity theft. An initial fraud alert stays on your credit report for at least 90 days. You may have an extended alert placed on your credit report if you have already been a victim of identity theft with the appropriate documentary proof. An extended fraud alert stays on your credit report for seven years. You can place a fraud alert on your credit report by calling the toll-free fraud number of any of the three national consumer reporting agencies listed below.

**Equifax:** 1-800-525-6285, [www.equifax.com](http://www.equifax.com)

**Experian:** 1-888-397-3742, [www.experian.com](http://www.experian.com)

**TransUnion:** 1-800-680-7289, [www.transunion.com](http://www.transunion.com)

**Credit Freezes (for Non-Massachusetts Residents):** You may have the right to put a credit freeze, also known as a security freeze, on your credit file, so that no new credit can be opened in your name without the use of a PIN number that is issued to you when you initiate a freeze. A credit freeze is designed to prevent potential credit grantors from accessing your credit report without your consent. If you place a credit freeze, potential creditors and other third parties will not be able to get access to your credit report unless you temporarily lift the freeze. Therefore, using a credit freeze may delay your ability to obtain credit. In addition, you may incur fees to place, lift and/or remove a credit freeze. Credit freeze laws vary from state to state. The cost of placing, temporarily lifting, and removing a credit freeze also varies by state, generally \$5 to \$20 per action at each credit reporting agency. Unlike a fraud alert, you must separately place a credit freeze on your

credit file at each credit reporting agency. Since the instructions for how to establish a credit freeze differ from state to state, please contact the three major consumer reporting agencies as specified below to find out more information:

**Equifax:** P.O. Box 105788, Atlanta, GA 30348, [www.equifax.com](http://www.equifax.com)

**Experian:** P.O. Box 9554, Allen, TX 75013, [www.experian.com](http://www.experian.com)

**TransUnion:** P.O. Box 2000, Chester, PA, 19022-2000, [www.transunion.com](http://www.transunion.com)

You can obtain more information about fraud alerts and credit freezes by contacting the FTC or one of the national consumer reporting agencies listed above.