



<<FirstName>> <<LastName>>

<<Date>> (Format: Month Day, Year)

<<Address1>>

<<Address2>>

<<City>>, <<State>> <<Zip Code>>

**Re: Revised Notice of Data Security Incident**

Dear <<FirstName>> <<LastName>>,

I am writing to follow up with additional information about the recent data security incident at Blum Shapiro & Company, P.C. ("blum") that may have impacted your personal information. At blum, we strive to maintain the trust of our clients by demonstrating our commitment to the security of all information within our possession. That is why I am writing to provide follow up information about this incident, to reiterate our offer for complimentary Norton LifeLock credit monitoring and identity theft restoration services, and to inform you about steps that can be taken to help safeguard your personal information.

**What Happened?** On or about June 17, 2020, we learned that several blum clients had experienced unusual activity relating to the filing of their tax returns. Upon learning of this activity, we immediately launched an internal investigation through which we determined that credentials required to access the system in which information pertaining to blum clients was stored had been compromised. We then immediately took steps to secure the system. To assist with our internal investigation, we also engaged leading, independent digital forensics and cybersecurity experts. On June 30, 2020, we received confirmation that an unauthorized individual had gained access to our document management system between April 28, 2020 and June 16, 2020. A review of the documents potentially accessed from within the document management system by the unauthorized individual revealed that some of your personal information may have been impacted.

**What Information Was Involved?** The information affected by this incident may have included your name, Social Security number, driver's license number, financial account / routing number, and / or other information contained within documents previously provided by you to blum in connection with your tax preparation services. Your blum partner can provide information about which specific data elements pertaining to you may have been impacted.

**What We Are Doing.** Upon discovering this incident, in addition to taking the steps described above, we promptly notified the Federal Bureau of Investigation and the Internal Revenue Service Criminal Investigation Division in an effort to help prevent fraudulent activity. We will continue to provide whatever cooperation is necessary to hold the perpetrator(s) of this incident accountable. We have also implemented multi-factor authentication on our document management system in an effort to prevent a similar incident from reoccurring in the future.

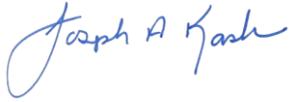
Additionally, we are providing you with information about steps that you can take to help protect your personal information and we are offering you LifeLock Defender™ Preferred credit monitoring and identity theft restoration services for 24 months, at no cost to you. A description of LifeLock's Defender™ Preferred services is included with this letter, along with enrollment instructions. The deadline to enroll in these services is October 16<sup>th</sup>, 2020.

**What You Can Do.** We recommend that you activate your complimentary LifeLock Defender™ Preferred services. Activation instructions and a description of the services being provided are included with this letter. We also recommend that you review the guidance included with this letter about how to protect your personal information. In addition, if you haven't already done so, we encourage you to complete IRS Form 14039, Identity Theft Affidavit, which you can obtain at <http://www.irs.gov/pub/irs-pdf/f14039.pdf>. blum is available to assist with this process.

**For More Information.** Further information about how to help protect your personal information appears on the following page. If you have questions or need assistance, please contact our Norton LifeLock team at (866) 809-4705. Norton LifeLock representatives can assist you with any questions about this incident, credit monitoring activation, identity protection, or steps you can take to safeguard your information.

Thank you for your patience through this incident. We take your trust in us and this matter very seriously. Please accept our sincere apologies and know that we deeply regret any worry or inconvenience that this may cause you.

Sincerely,

A handwritten signature in blue ink that reads "Joseph A. Kask". The signature is written in a cursive style with a large initial 'J'.

Joseph A. Kask  
Chief Executive Officer  
blumshapiro

## Steps You Can Take to Further Protect Your Information

**Review Your Account Statements and Notify Law Enforcement of Suspicious Activity:** As a precautionary measure, we recommend that you remain vigilant by reviewing your account statements and credit reports closely. If you detect any suspicious activity on an account, you should promptly notify the financial institution or company with which the account is maintained. You also should promptly report any fraudulent activity or any suspected incidence of identity theft to proper law enforcement authorities, your state attorney general, and/or the Federal Trade Commission (FTC).

**Copy of Credit Report:** You may obtain a free copy of your credit report from each of the three major credit reporting agencies once every 12 months by visiting <http://www.annualcreditreport.com/>, calling toll-free 877-322-8228, or by completing an Annual Credit Report Request Form and mailing it to Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA 30348. You also can contact one of the following three national credit reporting agencies:

**TransUnion**

P.O. Box 1000  
Chester, PA 19016  
1-800-916-8800

[www.transunion.com](http://www.transunion.com)

**Experian**

P.O. Box 2002  
Allen, TX 75013  
1-888-397-3742

[www.experian.com](http://www.experian.com)

**Equifax**

P.O. Box 740241  
Atlanta, GA 30374  
1-866-349-5191

[www.equifax.com](http://www.equifax.com)

**Free Annual Report**

P.O. Box 105281  
Atlanta, GA 30348  
1-877-322-8228

[annualcreditreport.com](http://annualcreditreport.com)

**Fraud Alert:** You may want to consider placing a fraud alert on your credit report. An initial fraud alert is free and will stay on your credit file for at least 90 days. The alert informs creditors of possible fraudulent activity within your report and requests that the creditor contact you prior to establishing any accounts in your name. To place a fraud alert on your credit report, contact any of the three credit reporting agencies identified above. Additional information is available at <http://www.annualcreditreport.com>.

**Security Freeze:** Under U.S. law, you have the right to put a security freeze on your credit file for up to one year at no cost. This will prevent new credit from being opened in your name without the use of a PIN number that is issued to you when you initiate the freeze. A security freeze is designed to prevent potential creditors from accessing your credit report without your consent. As a result, using a security freeze may interfere with or delay your ability to obtain credit. You must separately place a security freeze on your credit file with each credit reporting agency. In order to place a security freeze, you may be required to provide the consumer reporting agency with information that identifies you including your full name, Social Security number, date of birth, current and previous addresses, a copy of your state-issued identification card, and a recent utility bill, bank statement or insurance statement.

**Additional Free Resources:** You can obtain information from the consumer reporting agencies, the FTC, or from your respective state Attorney General about fraud alerts, security freezes, and steps you can take toward preventing identity theft. You may report suspected identity theft to local law enforcement, including to the FTC or to the Attorney General in your state. Residents of North Carolina can obtain more information using the contact below.

**Federal Trade  
Commission**

600 Pennsylvania Ave, NW  
Washington, DC 20580  
consumer.ftc.gov, and  
www.ftc.gov/idtheft  
1-877-438-4338

**Maryland Attorney  
General**

200 St. Paul Place  
Baltimore, MD 21202  
oag.state.md.us  
1-888-743-0023

**North Carolina Attorney  
General**

9001 Mail Service Center  
Raleigh, NC 27699  
ncdoj.gov  
1-877-566-7226

**Rhode Island  
Attorney General**

150 South Main Street  
Providence, RI 02903  
www.riag.ri.gov  
401-274-4400

**You also have certain rights under the Fair Credit Reporting Act (FCRA):** These rights include to know what is in your file; to dispute incomplete or inaccurate information; to have consumer reporting agencies correct or delete inaccurate, incomplete, or unverifiable information; as well as other rights. For more information about the FCRA, and your rights pursuant to the FCRA, please visit [http://files.consumerfinance.gov/f/201504\\_cfpb\\_summary\\_your-rights-under-fcra.pdf](http://files.consumerfinance.gov/f/201504_cfpb_summary_your-rights-under-fcra.pdf).

**Blum Shapiro & Company, P.C.** has retained **NortonLifeLock** to provide you with 24 months of complimentary **LifeLock Defender™ Preferred** identity theft protection.

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

1. In your web browser, go directly to [www.LifeLock.com](http://www.LifeLock.com). Click on the yellow **“START MEMBERSHIP”** button (*do not attempt registration from a link presented by a search engine*).
2. You will be taken to another page where, below the FOUR protection plan boxes, you may enter the **Promo Code: LWBSC2007** and click the **“APPLY”** button.
3. On the next screen, enter your **Member ID: <<MEMBER ID>>** and click the **“APPLY”** button.
4. Your complimentary offer is presented. Click the red **“START YOUR MEMBERSHIP”** button.
5. Once enrollment is completed, you will receive a confirmation email (*be sure to follow ALL directions in this email*).

**Alternatively, to activate your membership over the phone, please call: (866) 809-4705.**

**You will have until October 16, 2020 to enroll in this service.**

Once you have completed the LifeLock enrollment process, the service will be in effect. Your **LifeLock Defender™ Preferred** membership includes:

- ✓ Primary Identity Alert System<sup>†</sup>
- ✓ 24/7 Live Member Support
- ✓ Dark Web Monitoring<sup>\*\*</sup>
- ✓ Norton™ Security Deluxe<sup>2</sup> (90 Day Free Subscription)
- ✓ Stolen Funds Reimbursement up to \$25,000<sup>+++</sup>
- ✓ Personal Expense Compensation up to \$25,000<sup>+++</sup>
- ✓ Coverage for Lawyers and Experts up to \$1 million<sup>+++</sup>
- ✓ U.S.-based Identity Restoration Team
- ✓ Annual Three-Bureau Credit Reports & Credit Scores<sup>1\*\*</sup>  
The credit scores provided are VantageScore 3.0 credit scores based on Equifax, Experian and TransUnion respectively. Third parties use many different types of credit scores and are likely to use a different type of credit score to assess your creditworthiness.
- ✓ Three-Bureau Credit Monitoring<sup>1\*\*</sup>
- ✓ USPS Address Change Verification Notifications
- ✓ Fictitious Identity Monitoring
- ✓ Credit, Checking and Savings Account Activity Alerts<sup>+++</sup>

<sup>1</sup>If your plan includes credit reports, scores, and/or credit monitoring features (“Credit Features”), two requirements must be met to receive said features: (i) your identity must be successfully verified with Equifax; and (ii) Equifax must be able to locate your credit file and it must contain sufficient credit history information. IF EITHER OF THE FOREGOING REQUIREMENTS ARE NOT MET YOU WILL NOT RECEIVE CREDIT FEATURES FROM ANY BUREAU. If your plan also includes Credit Features from Experian and/or TransUnion, the above verification process must also be successfully completed with Experian and/or TransUnion, as applicable. If verification is successfully completed with Equifax, but not with Experian and/or TransUnion, as applicable, you will not receive Credit Features from such bureau(s) until the verification process is successfully completed and until then you will only receive Credit Features from Equifax. Any credit monitoring from Experian and TransUnion will take several days to begin after your successful plan enrollment. No one can prevent all identity theft or cybercrime. <sup>†</sup> LifeLock does not monitor all transactions at all businesses.

<sup>2</sup> Norton Security Online provides protection against viruses, spyware, malware, and other online threats for up to 5 PCs, Macs, Android devices. Norton account features not supported in this edition of Norton Security Online. As a result, some mobile features for Android are not available such as anti-theft and mobile contacts backup. iOS is not supported.

<sup>\*\*</sup>These features are not enabled upon enrollment. Member must take action to get their protection.

<sup>+++</sup> Reimbursement and Expense Compensation, each with limits of up to \$25,000 for Defender Preferred. And up to \$1 million for coverage for lawyers and experts if needed. Benefits under the Master Policy are issued and covered by United Specialty Insurance Company (State National Insurance Company, Inc. for NY State members). Policy terms, conditions and exclusions at: [LifeLock.com/legal](http://LifeLock.com/legal).