



<<Return to Kroll>>
<<Return Address>>
<<City, State ZIP>>

<<FIRST_NAME>> <<MIDDLE_NAME>> <<LAST_NAME>> <<SUFFIX>>
<<ADDRESS_1>>
<<ADDRESS_2>>
<<CITY>>, <<STATE_PROVINCE>> <<POSTAL_CODE>>
<<COUNTRY>>



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

Re Notice of Data Breach

Dear <<First_name>> <<Last_name>>:

Sasserath & Co. takes privacy and security very seriously. As part of that commitment, we write to notify you of a data security incident in which your personal information was involved. This notice explains the incident and the steps we have taken to address it, and provides guidance for added protection of personal information. We also provide the opportunity to enroll in complimentary credit monitoring and identity protection services.

What Happened. On September 11, 2025, we became aware of a suspicious activity on our network. Outside cybersecurity specialists were engaged to investigate. We also notified the IRS and law enforcement. Our investigation has been completed, and we learned that there was unauthorized access to a single workstation on July 21, 2025, that resulted in access to a small number of draft tax returns in our system between August 20-27, 2025. That workstation was re-secured. We also confirmed that there is no further unauthorized activity in our system. We determined your personal information was included in the tax returns accessed.

What Information Was Involved. The personal information involved was your first and last name in combination with your <<b2b_text_1 (data elements)>>.

What We Are Doing. We re-secured the workstation and conducted a thorough review of the tax returns accessed to determine whose data was contained in them. We are providing you the opportunity to enroll in <<ServiceTerminMonths>> months of complimentary identity and credit monitoring services. These services alert you when changes occur to your credit file. This notification is sent to you the same day that the change or update takes place with the bureau. These services will be provided by Kroll, which specializes in fraud assistance and remediation services. Instructions about how to enroll in these services and additional resources available to you are included in the enclosed "Steps You Can Take to Help Protect Your Information." We have a professional call center, described below, that you may contact with questions.

What You Can Do. As a general matter, one may remain vigilant against incidents of identity theft and fraud by reviewing your credit reports and account statements for suspicious activity and in order to detect errors. If you discover suspicious or unusual activity on your accounts, please contact the institution. Additional information is enclosed about steps you can take to help protect against fraud and identity theft.

For More Information. Should you have any questions or concerns, please contact our dedicated assistance line with Kroll, at (844) 574-1242, Monday through Friday 9:00am – 6:30pm EST, excluding major U.S. holidays. Please know that the security of information is of the utmost importance to us. We stay committed to protecting your trust in us and regret any inconvenience that this may cause.

Sincerely,

Sasserath & Co.

Enclosure: *Steps You Can Take to Help Protect Your Information*

STEPS YOU CAN TAKE TO HELP PROTECT YOUR INFORMATION

Enrollment in Credit Monitoring Services

Visit <https://enroll.krollmonitoring.com> to activate and take advantage of your identity monitoring services.

You have until <<b2b_text_6 (activation deadline)>> to activate your identity monitoring services.

Membership Number: <<Membership Number s_n>>

For more information about Kroll and your Identity Monitoring services, you can visit info.krollmonitoring.com.

In order for you to receive the monitoring services described above, you must enroll within 90 days from the date of this letter. The enrollment requires an internet connection and e-mail account and may not be available to minors under the age of 18 years of age. Please note that when signing up for monitoring services, you may be asked to verify personal information for your own protection to confirm your identity.

Monitor Your Accounts and Credit Reports

You may remain vigilant against incidents of identity theft and fraud by reviewing your credit reports/account statements and explanation of benefits forms for suspicious activity and to detect errors. Under U.S. law, you are entitled to one free credit report annually from each of the three major credit reporting bureaus, TransUnion, Experian, and Equifax. To order your free credit report, visit www.annualcreditreport.com or call 1-877-322-8228. Once you receive your credit report, review it for discrepancies and identify any accounts you did not open or inquiries from creditors that you did not authorize. If you have questions or notice incorrect information, contact the credit reporting bureau.

You have the right to place an initial or extended “fraud alert” on a credit file at no cost. An initial fraud alert is a one-year alert that is placed on a consumer’s credit file. Upon seeing a fraud alert, a business is required to take steps to verify the consumer’s identity before extending new credit. If you are a victim of identity theft, you are entitled to an extended fraud alert lasting seven years. Should you wish to place a fraud alert, please contact any of the three credit reporting bureaus listed below.

As an alternative to a fraud alert, you have the right to place a “credit freeze” on a credit report, which will prohibit a credit bureau from releasing information in the credit report without your express authorization. The credit freeze is designed to prevent credit, loans, and services from being approved in your name without your consent. However, you should be aware that using a credit freeze may delay, interfere with, or prohibit the timely approval of any subsequent requests or applications you make regarding a new loan, credit, mortgage, or any other account involving the extension of credit. Pursuant to federal law, you cannot be charged to place or lift a credit freeze on your credit report. To request a credit freeze, you should provide the following information:

1. Full name (including middle initial as well as Jr., Sr., III, etc.);
2. Social Security number;
3. Date of birth;
4. Address for the prior two to five years;
5. Proof of current address, such as a current utility or telephone bill;
6. A legible photocopy of a government-issued identification card (e.g., state driver’s license or identification card); and
7. A copy of either the police report, investigative report, or complaint to a law enforcement agency concerning identity theft, if you are a victim of identity theft.

Should you wish to place a fraud alert or credit freeze, please contact the three major credit reporting bureaus listed below:

TransUnion 1-800-680-7289 www.transunion.com	Experian 1-888-397-3742 www.experian.com	Equifax 1-888-298-0045 www.equifax.com
TransUnion Fraud Alert P.O. Box 2000 Chester, PA 19016-2000	Experian Fraud Alert P.O. Box 9554 Allen, TX 75013	Equifax Fraud Alert P.O. Box 105069 Atlanta, GA 30348-5069
TransUnion Credit Freeze P.O. Box 160 Woodlyn, PA 19094	Experian Credit Freeze P.O. Box 9554 Allen, TX 75013	Equifax Credit Freeze P.O. Box 105788 Atlanta, GA 30348-5788

Additional Information

You can further educate yourself regarding identity theft, fraud alerts, credit freezes, and the steps you can take to protect your personal information by contacting the credit reporting bureaus, the Federal Trade Commission (FTC), or your state Attorney General. The FTC also encourages those who discover that their information has been misused to file a complaint with them. The FTC may be reached at 600 Pennsylvania Ave. NW, Washington, D.C. 20580; www.identitytheft.gov; 1-877-ID-THEFT (1-877-438-4338); and TTY: 1-866-653-4261.

You have the right to file a police report if you ever experience identity theft or fraud. Please note that in order to file a report with law enforcement for identity theft, you will likely need to provide some proof that you have been a victim. Instances of known or suspected identity theft should also be reported to law enforcement, your state Attorney General, and the FTC. This notice has not been delayed by law enforcement.

For D.C. residents, the District of Columbia Attorney General may be contacted at 441 4th Street NW #1100, Washington, D.C. 20001; 202-727-3400, and <https://oag.dc.gov/consumer-protection>.

For Maryland residents, the Maryland Attorney General may be contacted at Office of the Attorney General, 200 St. Paul Place, Baltimore, MD 21202; 1-888-743-0023; or www.marylandattorneygeneral.gov.

For 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: (i) the consumer reporting agencies must correct or delete inaccurate, incomplete, or unverifiable information; (ii) the consumer reporting agencies may not report outdated negative information; (iii) access to your file is limited; (iv) you must give consent for credit reports to be provided to employers; (v) you may limit “prescreened” offers of credit and insurance you get based on information in your credit report; (vi) and you may seek damages from violators. 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. We encourage you to review your rights pursuant to the Fair Credit Reporting Act by visiting https://files.consumerfinance.gov/f/201504_cfpb_summary_your-rights-under-fcra.pdf, or by writing Consumer Response Center, Room 130-A, FTC, 600 Pennsylvania Ave. N.W., Washington, D.C. 20580.

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

For North Carolina residents, the North Carolina Attorney General may be contacted at 9001 Mail Service Center, Raleigh, NC 27699-9001; 1-877-566-7226 or 1-919-716-6000; and www.ncdoj.gov.

For Oregon residents, the Oregon Attorney General may be contacted at Oregon Department of Justice, 1162 Court St. NE, Salem, OR 97301-4096; 1-877-877-9392; and <https://doj.state.or.us/consumer-protection/>.

For Rhode Island residents, the Rhode Island Attorney General may be reached at: 150 South Main Street, Providence, RI 02903; www.riag.ri.gov; and 1-401-274-4400. Under Rhode Island law, individuals have the right to obtain any police report filed in regard to this event. There are no residents from Rhode Island whose information was involved in this incident.