

March 5, 2026

BY E-MAIL

Office of the Attorney General
Consumer Protection Bureau
1 Granite Place South
Concord, NH 03301

To Whom It May Concern:

EP Wealth Advisors, LLC (“EP Wealth”) is providing notice of a cybersecurity incident. EP Wealth is an SEC-registered investment adviser that provides comprehensive wealth management services, including financial planning and portfolio management, to a wide range of clients across the U.S.

On February 2, 2026, we discovered that an unauthorized party had gained access to our network after compromising one employee’s credentials. After identifying suspicious activity on our network through automated monitoring and alerting, we promptly launched an investigation with the support of outside cybersecurity experts and took steps to terminate and prevent any unauthorized access. We also reported the incident to law enforcement. The investigation, which remains ongoing, has confirmed that the unauthorized party only had access to our network for about four hours on February 2, 2026, the same day we discovered and terminated the unauthorized access. The investigation also determined that the unauthorized party acquired copies of certain personal client data, including from a system we use to manage our client relationships.

As of March 4, 2026, EP Wealth has identified 277 New Hampshire residents whose personal information was acquired by the unauthorized party. The impacted information varies by individual, and includes individuals’ names, addresses, email addresses, dates of birth, tax IDs (Social Security number or Employer Identification Number), and in many cases, financial account numbers. The unauthorized party may also have accessed other information individuals may have shared with their EP Wealth advisor about them or their family members.

EP Wealth anticipates beginning to send notice to individuals on March 6, 2026 via First Class Mail and is expected to be complete on March 10, 2026. A sample notification letter is enclosed. As stated in the attached sample notice, EP Wealth is offering individuals 24 months of free credit monitoring services through Experian. We have also established a call center to respond to questions.

We have no indication that the data involved in this incident has been publicly disclosed, or that fraud or misuse of the data occurred or is likely to occur. We continue to monitor and improve our capabilities to detect any persistent threats and avoid future unauthorized access.

As noted above, our investigation of the incident is ongoing. We will provide your office with any material updates resulting from our investigation.

EP Wealth takes the protection of personal information of its customers seriously and is committed to answering any questions that you may have. Please do not hesitate to contact me at aberkshire@epwealth.com.

Respectfully yours,

Alan Berkshire
Chief Legal Officer

Enclosure

<<Original Full Name>>
<<Original Address 1>>
<<Original Address 2>>
<<Original City>> <<Original State >> <<Original Zip Code>>

Notice of Cybersecurity Incident

Dear <<Original First Name>>:

We're writing to inform you of a cybersecurity incident at EP Wealth Advisors, LLC ("EP Wealth"), which impacted certain of your personal information.

What Happened: On February 2, 2026, EP Wealth discovered unauthorized activity on our network involving one (1) employee's credentials that were compromised. We immediately activated our incident response protocols and terminated the unauthorized access within a matter of hours.

What Information Was Involved: An unauthorized party was able to obtain copies of certain data, including from tools we use to manage our client relationships. The unauthorized party obtained a copy of your name, address, email address, date of birth, tax ID (Social Security number or Employer Identification Number), and in many cases, financial account numbers. Other information you may have shared with EP Wealth pertaining to you or your family members may also have been impacted.

What We Are Doing: We are providing you with two (2) years of IdentityWorks from Experian—a comprehensive credit monitoring service that will provide you with alerts if there is any activity using your personal information—at no cost to you. This service also provides you with up to \$1M in identity theft insurance and full-service identity restoration.

You may enroll by June 30, 2026 at <https://www.experianidworks.com/3bcredit> using the below enrollment code.

Your code is: <<Activation Code>>

Alternatively, you may call **833-931-7669** for enrollment support and product questions Monday through Friday, 8am-8pm Central Time (excluding US holidays).

What You Can Do: In addition to enrolling in the comprehensive credit monitoring service described above, we recommend you promptly review your credit reports and account statements over the next 24 months and immediately notify EP Wealth or the relevant financial institution(s) of any unauthorized transactions, changes in contact information, or other suspicious activity.

We also recommend that you periodically obtain credit reports free of charge from each of the major nationwide credit reporting companies and that you have information relating to fraudulent transactions deleted. You may also consider placing an initial or extended "fraud alert" on your credit file, which puts creditors on notice that you may be a victim of fraud, including identity theft.

We have no indication that the data involved in this incident has been publicly disclosed, or that fraud or misuse of the data occurred or is likely to occur. EP Wealth's operations were not disrupted by this incident or any subsequent activity, and we continue to serve our clients without interruption.

For Additional Information

Additional information on obtaining a credit report free of charge, fraud alerts, and online guidance from the Federal Trade Commission is enclosed in **Attachment A**.

For more information or assistance, please contact us at **833-931-7669**.

Sincerely,

EP Wealth Advisors, LLC

Engagement Number: **B160013**

Enclosure

Attachment A: Additional Information on Protecting Your Information and State Law Information

Monitoring Your Accounts

Under U.S. law a consumer is entitled to one free credit report annually from each of the three major credit reporting bureaus: Equifax, Experian, and TransUnion. To order a free credit report, visit www.annualcreditreport.com or call 1-877-322-8228 toll-free. Consumers may also directly contact the three major credit reporting bureaus listed below to request a free copy of their credit report.

Consumers 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 display on a consumer’s credit file, a business is required to take steps to verify the consumer’s identity before extending new credit. If consumers are the victim of identity theft, they are entitled to an extended fraud alert, which is a fraud alert lasting seven years. Should consumers wish to place a fraud alert, please contact any of the three major credit reporting bureaus listed below.

As an alternative to a fraud alert, consumers 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 the consumer’s express authorization. The credit freeze is designed to prevent credit, loans, and services from being approved in a consumer’s name without consent. However, consumers should be aware that using a credit freeze to take control over who gets access to the personal and financial information in their credit report may delay, interfere with, or prohibit the timely approval of any subsequent request or application they make regarding a new loan, credit, mortgage, or any other account involving the extension of credit. Pursuant to federal law, consumers cannot be charged to place or lift a credit freeze on their credit report. To request a credit freeze, individuals may need to provide some or all of the following information:

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

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

- **Equifax**, <https://www.equifax.com/personal/credit-report-services/>, 1-888-298-0045
 - Equifax Fraud Alert, P.O. Box 105069, Atlanta, GA 30348-5069
 - Equifax Credit Freeze, P.O. Box 105788, Atlanta, GA 30348-5069
- **Experian**, <https://www.experian.com>, 1-888-397-3742
 - Experian Fraud Alert, P.O. Box 9554, Allen, TX 75013
 - Experian Credit Freeze, P.O. Box 9554, Allen, TX 75013

- **TransUnion**, <https://www.transunion.com/credit>, 1-800-916-8800
 - TransUnion Fraud Alert, P.O. Box 2000, Chester, PA 19016
 - TransUnion Credit Freeze, P.O. Box 160, Woodlyn, PA 19094

Additional Information

Consumers may further educate themselves regarding identity theft, fraud alerts, credit freezes, and the steps you can take to protect your personal information by contacting the three major credit reporting bureaus, the Federal Trade Commission, your state attorney general, or visiting usa.gov. The Federal Trade Commission may be reached at: 600 Pennsylvania Avenue NW, Washington, D.C. 20580; www.identitytheft.gov; 1-877-ID-THEFT (1-877-438-4338); and TTY: 1-866-653-4261. The Federal Trade Commission also encourages those who discover that their information has been misused or that they have been a victim of identity theft to file a complaint with them. Consumers can obtain further information on how to file such a complaint by way of the contact information and website address listed above. Consumers have the right to file a police report if they ever experience identity theft or fraud. Please note that to file a report with law enforcement for identity theft, consumers will likely need to provide some proof that they have been a victim. Instances of known or suspected identity theft should also be reported to law enforcement and the relevant state attorney general.

For District of Columbia residents, the District of Columbia Attorney General may be contacted at: 400 6th Street, NW, Washington, D.C. 20001; 202-727-3400; and oag.dc.gov.

For Massachusetts residents, under Massachusetts law, individuals have the right to obtain any police report filed in regard to this incident. If you are the victim of identity theft, you also have the right to file a police report and obtain a copy of it.

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; and <https://ag.ny.gov>. The New York Department of State Division of Consumer Protection may be contacted at: <http://www.dos.ny.gov/consumerprotection> or (800) 697-1220.

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 Rhode Island residents, the Rhode Island Attorney General may be contacted at: 150 South Main Street, Providence, RI 02903; (401) 274-4400; www.riag.ri.gov. Under Rhode Island law, individuals have the right to obtain any police report filed in regard to this event. There are approximately 37 Rhode Island residents that may be impacted by this event.