

\_\_\_\_\_, 2023

VIA U.S. MAIL

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

Dear [REDACTED],

As a valued client of Casey LeSueur Getz CPAs, we are writing to advise you of a potential data security incident that may have affected your personal information and, as a precaution, provide you with further resources and steps you can take to protect your information.

### **What Happened?**

On March 28, 2023, we received notice from the Internal Revenue Service (“IRS”) that a limited number of potentially fraudulent tax returns had been filed using the information of our clients in an attempt to collect improper refunds from the Federal Government. As a result, we notified the affected individuals. Out of an abundance of caution, we also immediately began an investigation, and started taking steps to identify, contain, and remediate any activity in our systems that could be related to this situation. These actions included proactively changing passwords and implementing additional technical safeguards on top of our existing protections.

In April 2023, we discovered suspicious activity on one (1) employee’s workstation (the “Incident”). We then engaged leading data security and privacy cybersecurity professionals to assist our investigation and response. Our investigation concluded that your tax information could have been present in the affected systems at the time of the Incident. Based on the findings of our investigation, it is possible that your personal information was accessed without authorization during the Incident.

### **What Information Was Involved?**

We have determined that unauthorized actors may have accessed information included within your tax file relating to you, potentially including your name, date of birth, social security number, tax identification number, and driver’s license number.

### **What We Are Doing.**

After receiving the initial notice from the IRS, we began an investigation, changed passwords, and began taking other steps to implement additional technical safeguards on top of our existing protections. We have since worked with tax authorities to share information and take further measures to protect our clients’ information. We are also working with leading data security



professionals to aid in our investigation and response and have reported the Incident to other relevant authorities.

To help relieve concerns, we have also secured the services of Kroll to provide identity monitoring at no cost to you for one (1) year. Kroll is a global leader in risk mitigation and response, and their team has extensive experience helping people who have sustained an unintentional exposure of confidential data. Your identity monitoring services include Credit Monitoring, Fraud Consultation, and Identity Theft Restoration.

Visit **[enroll.krollmonitoring.com/redeem](https://enroll.krollmonitoring.com/redeem)** to activate and take advantage of your identity monitoring services.

- You have until [REDACTED] to activate your identity monitoring services.
- Kroll Verification ID: [REDACTED]
- Kroll Activation Code: [REDACTED]

For more information about Kroll and your Identity Monitoring services, you can visit [info.krollmonitoring.com](https://info.krollmonitoring.com).

### **What You Can Do.**

Except for a limited number of attempts to collect improper refunds from the Federal Government, there is currently no evidence that any information that may be related to the Incident has been misused. Nonetheless, experts encourage simple steps for protecting your personal information, including changing your passwords regularly, monitoring your personal accounts closely, reporting suspicious activity to your financial institutions, and never sharing your personal information with unknown or untrusted sources. Please also review the enclosed “Additional Resources” section included with this letter, which describes additional steps you can take to help protect your information. Additionally, if you do not yet have an IRS Identity Protection Pin (“IP PIN”), you can find more information about applying for it below.

### **For More Information.**

If you have questions, please call our office at 480-658-2141, Monday through Friday from 9:00 a.m. to 5:00 p.m. Pacific Standard Time, excluding major U.S. holidays.

Sincerely,

Casey LeSueur Getz CPAs

## ADDITIONAL RESOURCES

### Contact information for the three nationwide credit reporting agencies:

**Equifax**, PO Box 740241, Atlanta, GA 30374, [www.equifax.com](http://www.equifax.com), 1-800-685-1111

**Experian**, PO Box 2104, Allen, TX 75013, [www.experian.com](http://www.experian.com), 1-888-397-3742

**TransUnion**, PO Box 2000, Chester, PA 19022, [www.transunion.com](http://www.transunion.com), 1-800-888-4213

**Free Credit Report.** It is recommended that you remain vigilant for incidents of fraud and identity theft by reviewing account statements and monitoring your credit report for unauthorized activity. You may obtain a copy of your credit report, free of charge, once every twelve (12) months from each of the three nationwide credit reporting agencies.

To order your annual free credit report please visit [www.annualcreditreport.com](http://www.annualcreditreport.com) or call toll free at 1-877-322-8228.

You can also order your annual free credit report by mailing a completed Annual Credit Report Request Form (available from the U.S. Federal Trade Commission's ("FTC") website at [www.consumer.ftc.gov](http://www.consumer.ftc.gov)) to: Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA 30348-5281.

**For Colorado, Georgia, Maine, Maryland, Massachusetts, New Jersey, Puerto Rico, and Vermont residents:** You may obtain one or more (depending on the state) additional copies of your credit report, free of charge. You must contact each of the credit reporting agencies directly to obtain such additional report(s).

**Fraud Alert.** You may place a fraud alert in your file by calling one of the three nationwide credit reporting agencies above. A fraud alert tells creditors to follow certain procedures, including contacting you before they open any new accounts or change your existing accounts. For that reason, placing a fraud alert can protect you, but also may delay you when you seek to obtain credit.

**Security Freeze.** You may obtain a security freeze on your credit report, free of charge, to protect your privacy and ensure that credit is not granted in your name without your knowledge. You may also submit a declaration of removal to remove information placed in your credit report as a result of being a victim of identity theft. You have a right to place a security freeze on your credit report, free of charge, or submit a declaration of removal pursuant to the Fair Credit Reporting and Identity Security Act.

The security freeze will prohibit a consumer reporting agency from releasing any information in your credit report without your express authorization or approval. The security freeze is designed to prevent credit, loans, and services from being approved in your name without your consent. When you place a security freeze on your credit report, you will be provided with a personal identification number, password, or similar device to use if you choose to remove the freeze on your credit report or to temporarily authorize the release of your credit report to a specific party or parties or for a specific period of time after the freeze is in place.

To place a security freeze on your credit report, you may be able to use an online process, an automated telephone line, or a written request to any of the three credit reporting agencies listed above. The following information must be included when requesting a security freeze (note that if you are requesting a credit report for your spouse, this information must be provided for him/her as well): (1) full name, with middle initial and any suffixes; (2) Social Security number; (3) date of birth; (4) current address and any previous addresses for the past five years; and (5) any applicable incident report or complaint with a law enforcement agency or the Registry of Motor Vehicles. The request must also include a copy of a government-issued identification card and a copy of a recent utility bill or bank or insurance statement. It is essential that each copy be legible, and display your name, current mailing address, and the date of issue.

**For New Mexico Residents:** You may obtain a security freeze on your credit report to protect your privacy and ensure that credit is not granted in your name without your knowledge. You may submit a declaration of removal to remove information placed in your credit report as a result of being a victim of identity theft. You have a right to place a security freeze on your credit report or submit a declaration of removal pursuant to the Fair Credit Reporting and Identity Security Act.

**Federal Trade Commission and State Attorneys General Offices.** If you believe you are the victim of identity theft or have reason to believe your personal information has been misused, you should immediately contact the Federal Trade Commission and/or the Attorney General's office in your home state. You may also contact these agencies for information on how to prevent or avoid identity theft.

You may contact the **Federal Trade Commission**, Consumer Response Center, 600 Pennsylvania Avenue, NW, Washington, DC 20580, [www.ftc.gov/bcp/edu/microsites/idtheft/](http://www.ftc.gov/bcp/edu/microsites/idtheft/), 1-877-IDTHEFT (438-4338).

**For Alabama Residents:** You may contact the Attorney General's Office for the State of Alabama, Consumer Protection Division, 501 Washington Avenue, Montgomery, AL 36104, [www.oag.state.md.us](http://www.oag.state.md.us), 1-800-392-5658.

**For District of Columbia Residents:** You may contact the District of Columbia Office of the Attorney General, 400 6th Street NW, Washington, D.C. 20001, [consumer.protection@dc.gov](mailto:consumer.protection@dc.gov), (202) 442-9828.

**For Illinois Residents:** You may contact the Illinois Office of the Attorney General, 100 West Randolph Street, Chicago, IL 60601, [https://illinoisattorneygeneral.gov/about/email\\_ag.jsp](https://illinoisattorneygeneral.gov/about/email_ag.jsp), 1-800-964-3013.

**For Iowa Residents:** You may contact the Iowa Office of the Attorney General, 1305 E. Walnut Street, Des Moines IA 50319, [consumer@ag.iowa.gov](mailto:consumer@ag.iowa.gov), 1-888-777-4590.

**For Kansas Residents:** You may contact the Kansas Office of the Attorney General, Consumer Protection Division, 120 SW 10th Ave, 2nd Floor, Topeka, KS 66612-1597, <https://ag.ks.gov/>, 1-800-432-2310.

**For Kentucky Residents:** You may contact the Kentucky Office of the Attorney General, Consumer Protection Division, 1024 Capital Center Drive, Suite 200, Frankfort, Kentucky 40601, [www.ag.ky.gov](http://www.ag.ky.gov), 1-800-804-7556.

**For Maryland Residents:** You may contact the Maryland Office of the Attorney General, Consumer Protection Division, 200 St. Paul Place, Baltimore, MD 21202, [www.oag.state.md.us](http://www.oag.state.md.us), 1-888-743-0023.

**For Minnesota Residents:** You may contact the Minnesota Office of the Attorney General, Consumer Protection Division, 200 St. Paul Place, Baltimore, MD 21202, [www.oag.state.md.us](http://www.oag.state.md.us), 1-888-743-0023.

**For Missouri Residents:** You may contact the Missouri Office of the Attorney General, Consumer Protection, 207 W. High St., P.O. Box 899, Jefferson City, MO 65102, [www.ago.mo.gov](http://www.ago.mo.gov), 1-800-392-8222.

**For New Mexico Residents:** You may contact the New Mexico Office of the Attorney General, Consumer Protection Division, 408 Galisteo Street, Villagra Building, Santa Fe, NM 87501, [www.nmag.gov](http://www.nmag.gov), 1-844-255-9210.

**For New York Residents:** You may contact the New York Office of the Attorney General, Office of the Attorney General, The Capitol, Albany, NY 12224-0341, <https://ag.ny.gov>, 1-800-771-7755.

**For North Carolina Residents:** You may contact the North Carolina Office of the Attorney General, Consumer Protection Division, 9001 Main Service Center, Raleigh, NC 27699-9001, [www.ncdoj.gov](http://www.ncdoj.gov), 1-877-566-7266.

**For Rhode Island Residents:** You may contact the Rhode Island Office of the Attorney General, Consumer Protection Division, 150 South Main Street, Providence, RI 02903, [www.riag.ri.gov](http://www.riag.ri.gov), 1-401-274-4400.

**For Texas Residents:** You may contact the Texas Office of the Attorney General, Office of the Attorney General, PO Box 12548, Austin, TX 78711-2548, [www.texasattorneygeneral.gov](http://www.texasattorneygeneral.gov), 1-800-621-0508.

Reporting of identity theft and obtaining a police report. You have the right to obtain any police report filed in the United States in regard to this incident. If you are the victim of fraud or identity theft, you also have the right to file a police report.

**For Iowa Residents:** You are advised to report any suspected identity theft to law enforcement or to the Iowa Attorney General.

**For Massachusetts Residents:** You have the right to obtain a police report if you are a victim of identity theft.

**For North Carolina Residents:** You are advised to report any suspected identity theft to law enforcement or to the North Carolina Attorney General.

**For Oregon Residents:** You are advised to report any suspected identity theft to law enforcement, the Federal Trade Commission, and the Oregon Attorney General.

**For Rhode Island Residents:** Under Rhode Island law, you have the right to obtain any police report filed in regard to this incident.

# KROLL

We have secured the services of Kroll to provide identity monitoring at no cost to you for one year. Kroll is a global leader in risk mitigation and response, and their team has extensive experience helping people who have sustained an unintentional exposure of confidential data. Your identity monitoring services include Credit Monitoring, Fraud Consultation, and Identity Theft Restoration.

## How to Activate Your Identity Monitoring Services

1. You must activate your identity monitoring services by [REDACTED]. Your Activation Code will not work after this date.
2. Visit [Enroll.krollmonitoring.com/redeem](https://enroll.krollmonitoring.com/redeem) to activate your identity monitoring services.  
Provide Your Activation Code: [REDACTED] and Your Verification ID: [REDACTED]

## Take Advantage of Your Identity Monitoring Services

You've been provided with access to the following services<sup>1</sup> from Kroll:

### **Single Bureau Credit Monitoring**

You will receive alerts when there are changes to your credit data—for instance, when a new line of credit is applied for in your name. If you do not recognize the activity, you'll have the option to call a Kroll fraud specialist, who can help you determine if it's an indicator of identity theft.

### **Fraud Consultation**

You have unlimited access to consultation with a Kroll fraud specialist. Support includes showing you the most effective ways to protect your identity, explaining your rights and protections under the law, assistance with fraud alerts, and interpreting how personal information is accessed and used, including investigating suspicious activity that could be tied to an identity theft event.

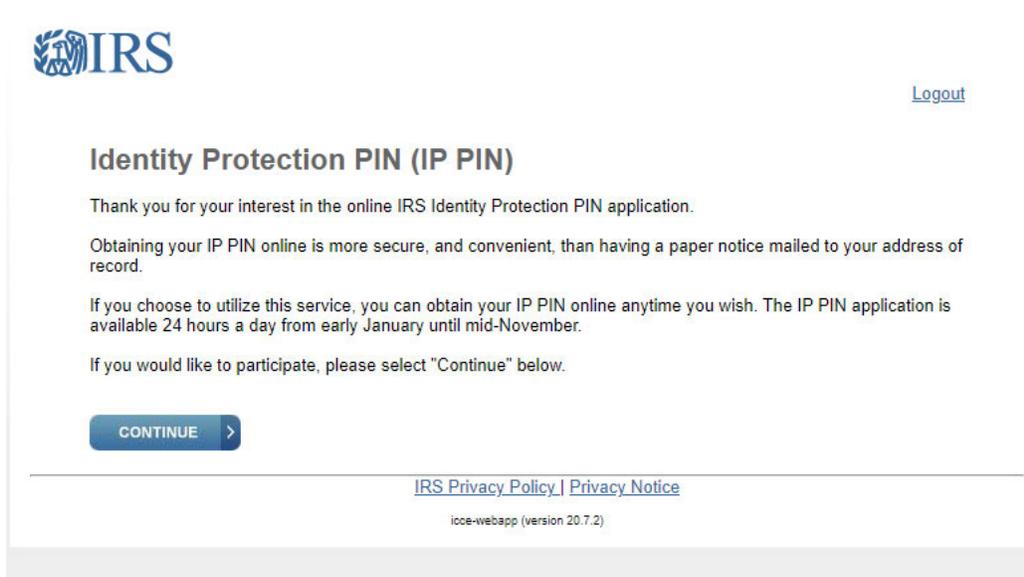
### **Identity Theft Restoration**

If you become a victim of identity theft, an experienced Kroll licensed investigator will work on your behalf to resolve related issues. You will have access to a dedicated investigator who understands your issues and can do most of the work for you. Your investigator can dig deep to uncover the scope of the identity theft, and then work to resolve it.

<sup>1</sup> Kroll's activation website is only compatible with the current version or one version earlier of Chrome, Firefox, Safari and Edge. To receive credit services, you must be over the age of 18 and have established credit in the U.S., have a Social Security number in your name, and have a U.S. residential address associated with your credit file.

## **How to Apply for IP PIN**

1. Go to: <https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin>
2. Select "Get an IP PIN"
3. Sign in to your IRS Account with ID.ME. If you don't have an account, follow the steps to create an ID.ME account. You will need to provide a screen shot of your identification (i.e. driver's license) to verify your identity. This is more easily done using your cell phone.
4. Once your account was established, return to the website (above) and select "Get an IP PIN".
5. Enter in your username and password.
6. Walk through the IRS process below to obtain a PIN for future filings:



The screenshot shows the IRS website interface for the Identity Protection PIN (IP PIN) application. At the top left is the IRS logo. At the top right is a "Logout" link. The main heading is "Identity Protection PIN (IP PIN)". Below the heading, there is a thank you message, a statement about the security and convenience of the online application, and a note about the availability of the service. A "CONTINUE" button with a right-pointing arrow is located below the text. At the bottom, there are links for "IRS Privacy Policy" and "Privacy Notice", and a version number "icce-webapp (version 20.7.2)".

 [Logout](#)

## Identity Protection PIN (IP PIN)

Thank you for your interest in the online IRS Identity Protection PIN application.

Obtaining your IP PIN online is more secure, and convenient, than having a paper notice mailed to your address of record.

If you choose to utilize this service, you can obtain your IP PIN online anytime you wish. The IP PIN application is available 24 hours a day from early January until mid-November.

If you would like to participate, please select "Continue" below.

[CONTINUE](#) >

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[IRS Privacy Policy](#) | [Privacy Notice](#)

icce-webapp (version 20.7.2)