

<<Name 1>> <<Name 2>>  
<<Address 1>>  
<<Address 2>>  
<<City>>, <<State>> <<Zip>>  
<<Country>>

<<Date>>

## SAMPLE DATA BREACH NOTICE

Dear <<Name 1>>,

Andersen Tax, LLC (“**Andersen**”) provides tax, financial advisory and related consulting services to individual and commercial clients, including <CLIENT>. We are writing to inform you of a recent incident that has impacted your personal information. We are contacting you to explain the circumstances of the incident, the types of information involved, how this incident is being addressed, and additional measures you can take to help protect your information, should you deem it necessary to do so.

**What Happened?** On June 29, 2023, a software system licensed by Andersen erroneously sent an attachment via e-mail to the limited partners for the <FUND> (the “**Fund**”) which included the K-1s for all limited partners in the Fund containing the personal information of other Fund participants, including yourself.

Andersen discovered the error on June 30, 2023, and immediately emailed all recipients, informing them of the issue and requesting that they delete the email and related attachments from their Inboxes and/or Trash folders and hard drives.

**What Information Was Involved?** The information involved included your name, address, and Social Security number.

**What We Are Doing.** We take this incident and the security of information in our care seriously. Upon learning about the incident, we promptly launched an internal investigation to determine the impact and scope of the incident. Further, we are working closely with our vendor to add additional oversight to our mailing process to prevent a similar error from happening in the future. We also notified the Chief Operating Officer and a Director at <CLIENT> and remain in close contact with them about this incident.

**What You Can Do.** We are offering complimentary access to Experian IdentityWorks<sup>SM</sup> for 24 months. We also encourage you to remain vigilant against incidents of identity theft and fraud by reviewing your account statements and monitoring your free credit reports for suspicious activity and to detect errors. Please also review the section below titled *Information About Identity Theft Protection*, which contains information on what you can do to safeguard against possible misuse of your information, such as placing a fraud alert or security freeze on your credit files and how to obtain free credit reports.

If you believe there was fraudulent use of your information as a result of this incident and would like to discuss how you may be able to resolve those issues, please reach out to an Experian agent. If, after discussing your situation with an agent, it is determined that identity restoration support is needed then an Experian Identity Restoration agent is available to work with you to investigate and resolve each incident of fraud that occurred from the date of the incident (including, as appropriate, helping you with contacting credit grantors to dispute charges and close accounts; assisting you in placing a freeze on your credit file



with the three major credit bureaus; and assisting you with contacting government agencies to help restore your identity to its proper condition).

Please note that Identity Restoration is available to you for 24 months from the date of this letter and does not require any action on your part at this time. The Terms and Conditions for this offer are located at [www.ExperianIDWorks.com/restoration](http://www.ExperianIDWorks.com/restoration).

While identity restoration assistance is immediately available to you, we also encourage you to activate the fraud detection tools available through Experian IdentityWorks as a complimentary 24-month membership. This product provides you with superior identity detection and resolution of identity theft. To start monitoring your personal information, please follow the steps below:

- Ensure that you **enroll by October 31, 2023** (Your code will not work after this date.)
- **Visit** the Experian IdentityWorks website to enroll: <https://www.experianidworks.com/credit>
- Provide your **activation code**: [Activation Code]

If you have questions about the product, need assistance with Identity Restoration that arose as a result of this incident, or would like an alternative to enrolling in Experian IdentityWorks online, please contact Experian's customer care team at (833) 541-1165 by **October 31, 2023**. Be prepared to provide engagement number **B098702** as proof of eligibility for the Identity Restoration services by Experian.

#### **ADDITIONAL DETAILS REGARDING YOUR 24-MONTH EXPERIAN IDENTITYWORKS MEMBERSHIP**

A credit card is not required for enrollment in Experian IdentityWorks. You can contact Experian immediately regarding any fraud issues, and have access to the following features once you enroll in Experian IdentityWorks:

- **Experian credit report at signup:** See what information is associated with your credit file. Daily credit reports are available for online members only.\*
- **Credit Monitoring:** Actively monitors Experian file for indicators of fraud.
- **Identity Restoration:** Identity Restoration specialists are immediately available to help you address credit and non-credit related fraud.
- **Experian IdentityWorks ExtendCARE™:** You receive the same high-level of Identity Restoration support even after your Experian IdentityWorks membership has expired.
- **\$1 Million Identity Theft Insurance\*\*:** Provides coverage for certain costs and unauthorized electronic fund transfers.

We apologize for any inconvenience this incident may have caused. We are committed to maintaining the privacy of personal information in our possession and have taken many precautions to safeguard it. We will continue to evaluate and modify our internal controls (including oversight of our vendors) to enhance the security and privacy of your personal information.

If you have further questions or concerns, please call us at 312-239-6102, Mondays – Fridays, 8:00 am to 5:00 pm, Eastern Time.

Sincerely,

*Andersen Tax, LLC*



## INFORMATION ABOUT IDENTITY THEFT PROTECTION

### **Monitor 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](http://www.annualcreditreport.com) or call, toll-free, 1-877-322-8228. Consumers may also directly contact the three major credit reporting bureaus listed below to request a free copy of their credit report.

### ***Fraud Alert***

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 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 you are a victim of identity theft, you are entitled to an extended fraud alert, which is a fraud alert lasting seven years. Should you wish to place a fraud alert, please contact any of the three major agencies listed below. The agency you contact will then contact the other two credit agencies.

### ***Credit Freeze***

You have the right to put a security freeze, also known as a “credit freeze,” on your credit file, so that no new credit can be opened in your name without the use of a Personal Identification Number (PIN) 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 access your credit report unless you temporarily lift the freeze. Therefore, using a credit freeze may delay your ability to obtain credit. Pursuant to federal law, you cannot be charged to place or lift a credit freeze on your credit report. Should you wish to request a credit freeze, please contact all three major consumer reporting agencies listed below. The following information should be included when requesting a credit freeze:

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.

<b>Equifax</b>	<b>Experian</b>	<b>TransUnion</b>
<a href="https://www.equifax.com/personal/credit-report-services/">https://www.equifax.com/personal/credit-report-services/</a>	<a href="https://www.experian.com/help/">https://www.experian.com/help/</a>	<a href="https://www.transunion.com/credit-help">https://www.transunion.com/credit-help</a>
1-888-298-0045	1-888-397-3742	1-800-916-8800
Equifax Fraud Alert, P.O. Box 105069 Atlanta, GA 30348-5069	Experian Fraud Alert, P.O. Box 9554, Allen, TX 75013	TransUnion Fraud Alert, P.O. Box 2000, Chester, PA 19016
Equifax Credit Freeze, P.O. Box 105788 Atlanta, GA 30348-5788	Experian Credit Freeze, P.O. Box 9554, Allen, TX 75013	TransUnion Credit Freeze, P.O. Box 160, Woodlyn, PA 19094



If you request a credit freeze online or by phone, then the credit reporting agencies have one (1) business day after receiving your request to place a credit freeze on your credit file report. If you request a lift of the credit freeze online or by phone, then the credit reporting agency must lift the freeze withing one (1) hour. If you request a credit freeze or lift of a credit freeze by mail, then the credit agency must place or lift the credit freeze no later than three (3) business days after receiving your request.

### **Additional Information**

If you believe that you are the victim of identity theft or have reason to believe that your personal information has been misused, you should immediately contact the Federal Trade Commission and/or Attorney General's office in your home state. You may also contact these agencies for information on how to prevent or minimize the risks of identity theft, including the use of fraud alerts and security freezes. You may contact the Federal Trade Commission, Consumer Response Center, 600 Pennsylvania Avenue NW, Washington, D.C. 20580; [www.identitytheft.gov](http://www.identitytheft.gov); 1-877-ID-THEFT (1-877-438-4338); and TTY: 1-866-653-4261.

*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](http://www.ncdoj.gov).

