

June 18, 2021

Name

Address

Address

Address

**Re: Notice of a Data Breach**

Dear Valued Client:

**Please read this letter in its entirety.**

**What happened?**

We recently became aware of a situation where an unauthorized party accessed one of our company's internal servers and company computers. We discovered this situation on April 27, 2021 and took immediate steps to shut down access to the devices. In addition, we immediately engaged third-party expert assistance to help us investigate, evaluate and respond to the situation.

**What information was involved?**

Based on their review of the situation and an examination of the impacted computing devices, our forensics specialists have indicated that some personal data belonging to you may have potentially been exposed to the unauthorized intruder. This data may have included personally identifiable information (PII), such as some combination of your Full Name, Address, Date of Birth, Social Security Number, and Banking Information.

**While we have no evidence that any of your personal information was compromised or misused in any manner, we are taking appropriate precautionary measures to ensure your financial security and help alleviate concerns you may have.**

**What are we doing to address this situation?**

Weiss & Company has made immediate enhancements to our systems, security and practices. Additionally, we have engaged industry experts to assist us in conducting a full review of our security practices and systems to ensure that appropriate security protocols are in place.

We also are committed to helping those people who may have been impacted by this unfortunate situation. That is why Weiss & Company is providing you with access to **Triple Bureau Credit Monitoring\*** services at no charge. These services provide you with alerts for twelve months from the date of enrollment when changes occur to any of one of your Experian, Equifax or TransUnion credit files. This notification is sent to you the same day that the change or update takes place with the bureau. In addition, we are providing you with proactive fraud assistance to help with any questions that you might have.

To enroll in Triple Bureau Credit Monitoring\* services at no charge, please log on to <URL> and follow the instructions provided. When prompted please provide the following unique code to receive services: **<CODE HERE.>**

**For guidance with these services, or to obtain additional information about these services, please call the help line at 1-800-405-6108 and provide the fraud specialist with your unique code.** Representatives have been retained to help you with any questions or problems you may encounter, including assisting you with obtaining a credit report and setting up fraud alerts.

\* Services marked with an "\*" require 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.

### **Additional steps you can take do to address this situation?**

If you choose not to use the services described above, we are strongly urging all clients to consider doing the following:

**If you choose to place a fraud alert on your own, you will need to contact one of the three major credit agencies directly at:**

**Experian (1-888-397-3742)**  
**P.O. Box 4500**  
**Allen, TX 75013**  
[www.experian.com](http://www.experian.com)

**Equifax (1-800-525-6285)**  
**P.O. Box 740241**  
**Atlanta, GA 30374**  
[www.equifax.com](http://www.equifax.com)

**TransUnion (1-800-680-7289)**  
**P.O. Box 2000**  
**Chester, PA 19016**  
[www.transunion.com](http://www.transunion.com)

**Also, should you wish to obtain a credit report and monitor it on your own:**

- **IMMEDIATELY** obtain free copies of your credit report and monitor them upon receipt for any suspicious activity. You can obtain your free copies by going to the following website: [www.annualcreditreport.com](http://www.annualcreditreport.com) or by calling them toll-free at 1-877-322-8228. (Hearing impaired clients can access their TDD service at 1-877-730-4204.
- **Upon receipt of your credit report**, we recommend that you review it carefully for any suspicious activity.
- Be sure to promptly report any suspicious activity to Weiss & Company.

### **IRS strongly advises obtaining an Identity Protections PIN**

The Identity Protections (“IP”) PIN is a 6-digit number assigned to eligible taxpayers. It helps prevent identity thieves from filing fraudulent tax returns with stolen Social Security numbers (SSNs). An IP PIN also helps the IRS verify taxpayers’ identities and accept their electronic or paper tax returns for processing. The IRS issues IP PINs to confirmed identity theft victims once their cases are resolved. This process is unchanged. What is new is that any taxpayers who wants an IP PIN, even if they are not victims of identity theft, may now obtain one as well.

#### **Here’s what you need to know before applying for your IP PIN:**

- This is a voluntary program.
- You must pass a rigorous identity verification process to obtain an IP PIN.
- Spouses and dependents are also eligible for an IP PIN if they can verify their identities.
- An IP PIN is valid for a calendar year.
- You must obtain a new IP PIN each filing season, using the online IP PIN tool.
- The online IP PIN tool is unavailable generally mid-November through mid-January each year.
- Correct IP PINs must be entered on electronic and paper tax returns to avoid rejections and delays.

#### **How to Get an IP PIN:**

The fastest, easiest and preferred way is by using the **Get an IP PIN** online tool. Here is how it works:

- Go to [IRS.gov/IPPIN](http://IRS.gov/IPPIN), select the **Get an IP PIN** tool, verify your identity, and create an account
- Once you have a username, password and security code, you can enter the **Get an IP PIN** tool
- Once in, your IP PIN will be revealed to you.

#### **Unable to pass the online identity proofing?**

There are alternatives available, but there will be a delay in obtaining an IP PIN. Here is how it works:

\* Services marked with an “\*” require 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.

- File a Form 15227 if you have a valid SSN or ITIN, an adjusted gross income of \$72,000 or less, and access to a telephone. An IRS assistor will call you, validate your identity and ensure that you receive an IP PIN the next filing season.
- If you are ineligible for Form 15227, call the IRS to learn about in-person options.

**Other important information:**

You can also obtain more information about identity theft and ways to protect yourself from the Federal Trade Commission (FTC). The FTC has an identity theft hotline: 877-438-4338; TTY: 1-866-653-4261. They also provide information on-line at [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft).

**For more information:**

While representatives should be able to provide thorough assistance and answer most of your questions, you may still feel the need to speak with Weiss & Company regarding this incident. If so, please call me at 858-362-9999 between 9:00 AM and 5:00 PM Pacific Time, Monday through Friday.

At Weiss & Company we take our responsibilities to protect your personal information very seriously. We are deeply disturbed by this situation and apologize for any inconvenience.

Sincerely,

Kenneth L. Weiss  
President of Weiss & Company