CAPITAL TAX & CONSULTING, LLC

Secure Processing Center
25 Route 111, P.O. Box 1048
Smithtown, NY 11787

Postal Endorsement Line
<<Full Name>>
<<Address 1>>
<<Address 2>>
<<Address 3>>
<<City>>, <<State>> <<Zip>>
<<Country>>
***Postal IMB Barcode

<<Date>>

<<Variable Data 1>>

Dear <<Full Name>>,

We are writing to inform you that Capital Tax & Consulting LLC ("Capital Tax" or "we") experienced a data incident discovered in February 2025 (the "Incident") that potentially involved your personal information ("Information"). This letter provides you with information about this Incident, our response, and information on where to direct your questions. Additionally, although we are unaware of any identity theft or fraud in relation to the Incident, as a precaution we have also provided steps you can take to protect your Information, including the ability to enroll in credit monitoring services that we are offering free of charge for <<CM Duration>> months.

What Happened?

On February 6, 2025, we discovered suspicious activity on our computer systems and immediately began an investigation and took steps to contain the situation, including changing passwords, notifying the Internal Revenue Service and state tax authorities, and engaging data security and privacy professionals to assist. Our investigation determined there was unauthorized access to our files from January 30, 2025, through February 6, 2025, and files containing your Information may have been subject to unauthorized acquisition during that time. Currently, there is no evidence of identity theft or fraud in relation to this Incident.

What Information Was Involved?

We determined that the following types of Information related to your tax file may have been impacted as a result of this Incident: name, <<Breached Elements>>.

What We Are Doing.

Upon becoming aware of the Incident, we immediately began an investigation and have since worked closely with tax authorities to share information and take steps to protect our clients' information. We have also added technical security protections on top of our existing protections, including enhancing monitoring capabilities over our environment. After determining unauthorized activity occurred on our systems, we immediately began analyzing the information involved to confirm the identities of potentially affected individuals and notify them. We have worked with data security and privacy professionals to aid in our response and reported this Incident to relevant government agencies.

What Can You Do?

To help protect your identity, we are offering complimentary access to Epiq Privacy Solutions ID for <<CM Duration>> months. This product provides you with superior identity monitoring and resolution of identity theft. To start monitoring your personal information, please follow the steps below:

1. Visit www.privacysolutionsid.com and click “Activate Account”.
2. Enter the following activation code, **<<Activation Code>>** and complete the enrollment form.
3. Complete the identity verification process.
4. You will receive a separate email from noreply@privacysolutions.com confirming your account has been set up successfully and will include an Access Your Account link in the body of the email that will direct you to the log-in page.
5. Enter your log-in credentials.
6. You will be directed to your dashboard and activation is complete!

If you have questions about the product, need assistance with Identity Restoration that arose as a result of this Incident, or need assistance with enrolling, please contact Epiq’s customer care team at 866-675-2006, Monday through Friday 8:00 am Central to 4:30 pm Central Time on or before **<<Enrollment Deadline>>**.

In addition to enrolling in Epiq Privacy Solutions ID, it is always recommended that you remain vigilant, regularly monitor free credit reports, review account statements, and report any suspicious activity to financial institutions. Please also review the “Additional Resources” section included with this letter, which outlines other resources you can utilize to protect your Information. 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.

We take this Incident and the security of information in our care seriously. If you have questions about Epiq Privacy Solutions ID, please call the number above. If you have additional questions, you may call our toll-free assistance line for our dedicated call center at 877-332-1682 Monday through Friday from 8:00 a.m. to 8:00 p.m. Central Time (excluding U.S. holidays).

Sincerely,

Jennifer Gordon

Jennifer V. Gordon, CPA

Encl.

ADDITIONAL RESOURCES

Contact information for the three (3) nationwide credit reporting agencies:

Equifax, PO Box 740241, Atlanta, GA 30374, www.equifax.com, 1-800-685-1111
Experian, PO Box 2104, Allen, TX 75013, www.experian.com, 1-888-397-3742
TransUnion, PO Box 2000, Chester, PA 19022, 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 (3) nationwide credit reporting agencies.

To order your annual free credit report please visit **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) to: Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA 30348-5281.

For Colorado, Maine, Maryland, New Jersey, and Vermont residents: You may obtain one (1) 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 (1) of the three (3) 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 credit.

Security Freeze. You may obtain a security freeze on your credit report, free of charge, to protect your privacy and confirm 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 (3) 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 them 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.

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/, 1-877-IDTHEFT (438-4338).

For Arizona: You can obtain information from the Office of the Attorney General and the Federal Trade Commission about fraud alerts, security freezes, and steps you can take toward preventing identity theft. Consumer Protection & Advocacy Section, 2005 North Central Avenue, Phoenix, AZ 85004, 1-602-542-5025.

For California Residents: Visit the California Office of Privacy Protection (www.oag.ca.gov/privacy) for additional information on protection against identity theft. Office of the Attorney General of California, 1300 I Street, Sacramento, CA 95814, Telephone: 1-800-952-5225. This notification was not delayed as a result of any law enforcement investigation.

For Colorado Residents: You can obtain information from the federal trade commission and the credit reporting agencies about fraud alerts and security freezes.

For Connecticut residents: You may contact the Connecticut Office of the Attorney General, 165 Capitol Avenue, Hartford, CT 06106, 1-860-808-5318, www.ct.gov/ag.

For District of Columbia Residents: You can obtain information about steps to take to avoid identity theft from the Federal Trade Commission (contact information above) and The District of Columbia Office of the Attorney General, 400 6th Street NW, Washington, D.C. 20001, consumer.protection@dc.gov, https://oag.dc.gov/, (202) 737-3400.

For Illinois Residents: You can obtain information from the credit reporting agencies and the Federal Trade Commission about fraud alerts and security freezes (contact information above). You may contact the Illinois Office of the Attorney General, 100 West Randolph Street, Chicago, IL 60601, 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; www.iowattorneygeneral.gov, 1-888-777-4590. You are advised to report any suspected identity theft to law enforcement or to the Iowa Attorney General.

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, 1-800-804-7556.

For Maryland Residents: You may obtain information about steps you can take to avoid identity theft from the Federal Trade Commission (contact information above) and the Maryland Office of the Attorney General, Consumer Protection Division, 200 St. Paul Place, Baltimore, MD 21202, www.marylandattorneygeneral.gov, 1-888-743-0023.

For Minnesota Residents: You may contact the Minnesota Office of the Attorney General, 445 Minnesota Street, Suite 1400, St. Paul, MN 55101, www.ag.state.mn.us, 1-800-657-3787.

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, 1-800-392-8222.

For New York Residents: You may obtain information regarding security breach response and identity theft prevention and protection information from the Federal Trade Commission (contact information above) and 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 obtain information about preventing identity theft from the Federal Trade Commission (contact information above) and the North Carolina Office of the Attorney General, Consumer Protection Division, 9001 Main Service Center, Raleigh, NC 27699-9001, www.ncdoj.gov, 1-877-566-7266 or 1-919-716-6400. You are advised to report any suspected identity theft to law enforcement or to the North Carolina Attorney General.

For Oregon Residents: Oregon Department of Justice, 1162 Court Street NE, Salem, OR 97301-4096, www.doj.state.or.us/, Telephone: 1-877-877-9392. You are advised to report any suspected identity theft to law enforcement, the Federal Trade Commission, and the Oregon Attorney General.

For Pennsylvania Residents: You may contact the Pennsylvania Office of the Attorney General, Bureau of Consumer Protection, 15th Floor, Strawberry Square, Harrisburg, PA 17120, www.attorneygeneral.gov, 1-800-441-2555.

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, 1-800-621-0508.

For Wyoming Residents: This notification was not delayed as a result of any law enforcement investigation.

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.

How to Apply for an IRS Identity Protection PIN

- Go to: https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin.
- Select the button: "Get an IP PIN."
- The fastest way to receive an IP PIN is to request one through your ID.me account, under your "Profile" page. If you don't already have an account on IRS.gov, you must register to validate your identity.
- Spouses and dependents are eligible for an IP PIN if they can pass the identity verification process.
- Once you have opted in and obtained an IP PIN online, you will need to retrieve your IP PIN online each calendar year as a CP01A Notice will not be mailed. The IP PIN is generally available in your online account starting in mid-January through mid-November.

If you need help applying for this PIN, please call our office.