



[INDIVIDUAL NAME]  
[STREET ADDRESS]  
[CITY, STATE AND POSTAL CODE]  
{DATE}

Re: Notice of Security Incident

Dear [INDIVIDUAL NAME],

We, CapFinancial Partners, LLC, ("CAPTRUST") are contacting you to let you know about an incident which involves the unauthorized acquisition of your personal information. We take the protection of your information seriously and are reaching out to provide you with additional resources which may be helpful to you.

**WHAT INFORMATION WAS INVOLVED?**

The personal information accessed was name, address, and social security number.

**WHAT WE ARE DOING**

We take this incident, as well as the privacy and security of your information very seriously. We are conducting a thorough review of the incident internally and will be implementing additional security measures designed to protect against the recurrence of such an incident to enhance the privacy of CAPTRUST's valued clients. **Out of an abundance of caution, CAPTRUST is providing you with access to eighteen (18) months of complimentary credit monitoring.** Although we are making these services available to you, we are unable to enroll you directly for privacy reasons. To take advantage of your complimentary credit monitoring, please contact us at the number below.

**WHAT YOU CAN DO**

Please also review the attachment for further information on steps you can take to protect your information.

**FOR MORE INFORMATION**

We apologize for any inconvenience this incident may cause. For further information and assistance, please contact CAPTRUST at 617.488.2704 between 8:30AM-5:30PM ET, Monday through Friday.

Sincerely,

CAPTRUST  
4208 Six Forks Road, Suite 1700  
Raleigh, NC 27609



## Steps You Can Take to Further Protect Your Information

### Review Your Account Statements and Notify Law Enforcement of Suspicious Activity

Under Massachusetts law, you have the right to obtain any police report filed about this incident. As a precautionary measure, we recommend that you remain vigilant by reviewing your account statements and credit reports closely. If you detect any suspicious activity on an account, you should promptly notify the financial institution or company with which the account is maintained. You also should promptly report any fraudulent activity or any suspected incidence of identity theft to proper law enforcement authorities, including your state attorney general and the Federal Trade Commission (FTC).

To file a complaint with the FTC:

Website: [IdentityTheft.gov](http://IdentityTheft.gov)

Phone: 1-877-ID-THEFT (877-438-4338)

Complaints filed with the FTC will be added to the FTC's Identity Theft Data Clearinghouse, which is a database made available to law enforcement agencies.

### Obtain and Monitor Your Credit Report

As you may know, under federal law you are entitled to obtain a free copy of your credit report from each of the three major credit reporting agencies once every 12 months. You can do this through <http://www.annualcreditreport.com>, calling toll-free 877-322-8228, or by completing an Annual Credit Report Request Form and mailing it to:

Annual Credit Report Request Service  
P.O. Box 105281,  
Atlanta, GA 30348

You can access the request form online or you can elect to purchase a copy of your credit report by contacting one of the three national credit reporting agencies. Contact information for the three national credit reporting agencies for the purpose of requesting a copy of your credit report or for general inquiries is provided below:

	<b>Equifax</b>	<b>Experian</b>	<b>TransUnion</b>
<b>Contact Information</b>	(866) 349-5191 <a href="http://www.equifax.com">www.equifax.com</a> P.O. Box 740241 Atlanta, GA 30374	(888) 397-3742 <a href="http://www.experian.com">www.experian.com</a> P.O. Box 9532 Allen, TX 75013	(800) 888-4213 <a href="http://www.transunion.com">www.transunion.com</a> P.O. Box 1000 Chester, PA 19022

### **Consider Placing a Fraud Alert on Your Credit Report**

You may want to consider placing a fraud alert on your credit report. An initial fraud alert is free and will stay on your credit file for at least 90 days. The alert informs creditors of possible fraudulent activity within your report and requests that the creditor contact you prior to establishing any accounts in your name. To place a fraud alert on your credit report, contact any of the three credit reporting agencies identified above. Additional information is available at <http://www.annualcreditreport.com>.

### **Security Freeze**

You may have the right to put a security freeze on your credit file. A security freeze (also known as a credit freeze) makes it harder for someone to open a new account in your name. It is designed to prevent potential creditors from accessing your credit report without your consent. As a result, using a security freeze may interfere with or delay your ability to apply for a new credit card, wireless phone, or any service that requires a credit check. You must separately place a security freeze on your credit file with each credit reporting agency. To place a security freeze, you may be required to provide the consumer reporting agency with information that identifies you including your full name, Social Security number, date of birth, current and previous addresses, a copy of your state-issued identification card, and a recent utility bill, bank statement, or insurance statement. There is no charge to request a security freeze or to remove a security freeze.