Connecticut Wealth Management, LLC

281 Farmington Avenue
Farmington, CT 06032

[redacted]

July 7, 2026

Dear [redacted]:

The privacy and security of the personal information Connecticut Wealth Management, LLC ("**Connecticut Wealth**") maintains is of the utmost importance. As such, we want to follow-up on the conversation we had about a recent data security incident and reinforce the steps we continue to take to protect your information.

Upon learning of this, we secured our network and commenced an investigation. As part of our investigation, we have been working closely with external cybersecurity professionals who are experienced in handling these types of incidents. After a forensic investigation and review of the impacted data, on May 20, 2026, we determined that between April 20-21, 2026, a limited amount of your personal information may have been accessed by an unauthorized individual. The potentially impacted information includes your name and: [redacted].

While we have no evidence of financial fraud or identity theft related to this data, we want to make you aware of the incident. Out of an abundance of caution, and to protect you from the potential misuse of your information, we have put a heightened security status on your investment accounts and continue to monitor all activities. We are also providing you with complimentary 24-month credit monitoring services from LifeLock. To learn more about how to take advantage of these services, contact us at the number below.

To the extent helpful, this letter also provides precautionary measures you can take to protect your personal information, including placing a fraud alert and/or security freeze on your credit files, and/or obtaining a free credit report. Additionally, you should always remain vigilant in reviewing your financial account statements and credit reports for fraudulent or irregular activity on a regular basis.

Connecticut Wealth is committed to maintaining the privacy of the personal information in our possession and has taken many precautions to safeguard it. We also continually evaluate and modify our practices and internal controls to enhance the security and privacy of your personal information. If you have any further questions regarding this incident, you can contact us at 860-470-0290.

Sincerely,

Connecticut Wealth Management, LLC
281 Farmington Avenue Farmington, CT 06032

– OTHER IMPORTANT INFORMATION –

1. Placing a Fraud Alert or Security Freeze

If you are concerned about the possibility of fraud or identity theft, you can place a fraud alert or a security freeze on your credit file, at no charge. **Your advisory team can work with you to take these steps if you would like assistance.**

A fraud alert tells creditors to take additional steps to verify your identity before extending new credit in your name. You can place one by contacting any one of the three nationwide credit reporting agencies listed below; that agency must notify the other two. An initial fraud alert is free, lasts for one year, and may be renewed.

A security freeze restricts access to your credit file, which makes it more difficult for someone to open new credit in your name. A security freeze is free, and placing or lifting one will not affect your credit score. To place a freeze, you must contact each of the three nationwide credit reporting agencies separately, using the information below. When you request a freeze, you will need to provide identifying information such as your name, address, date of birth, and Social Security number. Each agency will give you a PIN or password and you will need this PIN if you later choose to lift the freeze, temporarily or permanently. The contact information for the credit reporting agencies is as follows:

- Equifax Security Freeze — P.O. Box 105788, Atlanta, GA 30348-5788 — equifax.com/personal/credit-report-services/credit-freeze — (888) 298-0045

- Experian Security Freeze — P.O. Box 9554, Allen, TX 75013 — experian.com/freeze — (888) 397-3742

- TransUnion Security Freeze — P.O. Box 160, Woodlyn, PA 19094 — transunion.com/credit-freeze — (888) 909-8872

You can obtain additional information about fraud alerts and security freezes from the Federal Trade Commission and from the three nationwide credit reporting agencies listed above.

Again, if you would like help placing a fraud alert or security freeze, your advisory team is available to assist you.

2. <u>Obtaining a Free Credit Report</u>.

Under federal law, you are entitled to one (1) free credit report every twelve (12) months from each of the above three (3) major nationwide credit reporting companies. Call **1-877-322-8228** or request your free credit reports online at **www.annualcreditreport.com**.

Once you receive your credit reports, we are happy to review them with you for discrepancies, identify any accounts you did not open or inquiries from creditors that you did not authorize, and verify that all information is correct. If there are questions or you notice incorrect information, we can also help you contact the credit reporting agencies.

3. <u>Additional Helpful Resources</u>.

Even if you do not find any suspicious activity on your initial credit reports, the Federal Trade Commission (FTC) recommends that you check your credit reports periodically. Checking your credit report periodically can help you spot problems and address them quickly. We can also include a periodic review of your credit report into our ongoing meetings.

If you find suspicious activity on your credit reports or have reason to believe your information is being misused, you can also call your local law enforcement agency and file a police report. Be sure to obtain a copy of the police report, as many creditors will want the information it contains to absolve you of the fraudulent debts. You may also file a complaint with the FTC by contacting them on the web at www.ftc.gov/idtheft, by phone at 1-877-IDTHEFT (1-877-

438-4338), or by mail at Federal Trade Commission, Consumer Response Center, 600 Pennsylvania Avenue, NW, Washington, DC 20580. Your complaint will be added to the FTC's Identity Theft Data Clearinghouse, where it will be accessible to law enforcement for their investigations.

Massachusetts Residents: Under Massachusetts law, you have the right to obtain a police report in regard to this incident. If you are the victim of identity theft, you also have the right to file a police report and obtain a copy of it.