[INSERT DATE]

Name
Address
City, State, Zip

TBD: Experian Call Center Information

Notice of Data Security Incident

At Raymond James Financial Services, Inc. ("Raymond James") and Werth Wealth Management, LLC protecting our clients' personal information is our top priority. As such, we are writing to inform you of a recent cybersecurity event involving the system at Werth Wealth Management, LLC (WWM) that may have involved some of your personal information. We wanted to notify you about the incident promptly, explain what occurred, and provide information about steps you can take to help protect your personal information. **This event did not involve access to your accounts held at Raymond James, and no client accounts were accessed or funds compromised.**

What happened?
On July 1, 2026, our cybersecurity division identified suspicious activity on WWM's systems. We immediately responded to isolate, secure, and analyze the incident. The investigation determined that an unauthorized third party accessed certain WWM systems containing files with the personal information of some clients. We are notifying you because your personal information may have been affected.

What information was involved?
The following data points may have been exposed:

- Name
- Government-issued identification numbers, such as your Social Security Number, driver's license number, or passport number
- Your Raymond James account numbers
- Date of birth

What are we doing?
Upon becoming aware of the incident, Raymond James and WWM took all of the following actions:

- Placed ID theft alerts on your Raymond James account(s) as a precautionary measure.
- Notified law enforcement.
- Worked with cybersecurity experts to terminate any unauthorized access to WWM systems and further strengthen the security of our systems.
- Secured credit monitoring services for you, as further described below.

What can you do?
As a precautionary measure, we encourage you to take advantage of the free credit report offering and credit monitoring service detailed below. While law enforcement has been engaged in investigating this incident, we encourage you to report any suspected identity theft to law enforcement, your state's attorney general, and the Federal Trade Commission. Please note that you have the right to obtain a police report with respect to any reported incident.

Other important information

1. Free credit report offering

We encourage you to remain vigilant in monitoring your financial account statements and free credit reports for unauthorized activity, fraud, and identity theft. Please review your personal account statements and credit reports for any errors resulting from the incident. You can obtain information from the Federal Trade Commission and consumer reporting agencies about fraud alerts, security freezes, and a free credit report annually.

Equifax	**Experian**	**TransUnion**
800-685-1111	888-397-3742	800-680-7289
P.O. Box 740241	P.O. Box 4500	P.O. Box 2000
Atlanta, GA 30374	Allen, TX 75013	Chester, PA 19022
www.equifax.com	www.experian.com	www.transunion.com

Federal Trade Commission
877-382-4357
600 Pennsylvania Avenue, NW
Washington, D.C. 20580
www.ftc.gov

2. Fraud Alert

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.

3. Security Freeze

You have the right to put a security freeze on your credit file. A security freeze prevents 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 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.

4. Credit monitoring service

As a precautionary measure, we would like to offer you a complimentary 2-year membership in Experian's IdentityWorks®, a credit monitoring and identity theft protection service. Experian's IdentityWorks® service provides you with access to your credit report from the three national credit reporting agencies and daily monitoring of your credit file.

To enroll, please visit https://www.experianidworks.com/3bplus and enter the activation code provided to you. Your activation code is XXXXXXX. Please ensure you activate your membership by [INSERT DATE].

Once the IdentityWorks® membership is activated, you will receive the following features:

- 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, Equifax, and TransUnion files for indicators of fraud.
- Internet Surveillance: Technology searches the web, chat rooms & bulletin boards 24/7 to identify trading or selling of your personal information on the Dark Web.

- 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.

If you have questions about IdentityWorks® or need an alternative to enrolling online, please call Experian at 1-877-890-9332 and provide engagement # XXXXXX.

For more information
We regret any inconvenience this may cause you, and encourage you to take advantage of the services listed above. Please be assured that the confidentiality of your personal information is of utmost importance to us.

Sincerely,

Tim Werth
Founding & Managing Partner
Werth Wealth Management, LLC

Rob Patchett
Chief Privacy Officer
Raymond James Financial, Inc.

For District of Columbia residents: You may contact the Office of the District of Columbia Attorney General at 400 6th Street NW, Washington, D.C. 20001, oag.dc.gov, 202-727-3400.

For Maryland residents: You may contact the Office of the Maryland Attorney General at 200 St. Paul Place, Baltimore, MD 21202, www.marylandattorneygeneral.gov, 888-743-0023.

For New Mexico residents: You have rights pursuant to the Fair Credit Reporting Act, such as the right to be told if information in your credit file has been used against you, the right to know what is in your credit file, the right to ask for your credit score, and the right to dispute incomplete or inaccurate information. Further, pursuant to the Fair Credit Reporting Act, the consumer reporting agencies must correct or delete inaccurate, incomplete, or unverifiable information; consumer reporting agencies may not report outdated negative information; access to your file is limited; you must give your consent for credit reports to be provided to employers; you may limit "prescreened" offers of credit and insurance you get based on information in your credit report; and you may seek damages from a violator. You may have additional rights under the Fair Credit Reporting Act not summarized here. Identity theft victims and active duty military personnel have specific additional rights pursuant to the Fair Credit Reporting Act. You can review your rights pursuant to the Fair Credit Reporting Act by visiting www.consumerfinance.gov/f/201504_cfpb_summary_your-rights-under-fcra.pdf, or by writing Consumer Response Center, Room 130-A, Federal Trade Commission, 600 Pennsylvania Ave. N.W., Washington, D.C. 20580.

For New York residents: You may contact the following state agencies for information regarding security breach response and identity theft prevention and protection information:

New York State Attorney General The Capitol Albany NY 12224-0341 1-800-771-7755 ag.ny.gov	New York Department of State Division of Consumer Protection One Commerce Plaza 99 Washington Avenue Albany, New York 12231 1-800-697-1220 dos.ny.gov

For North Carolina residents: You may contact the North Carolina Attorney General's Office at 114 West Edenton Street, Raleigh, NC 27603, www.ncdoj.gov, 1-877-566-7226.

For Oregon residents: You may contact the Oregon Attorney General at: Oregon Department of Justice, 1162 Court Street NE, Salem, OR 97301-4096, www.doj.state.or.us, 877-877-9392.

For Rhode Island residents: You may contact the Rhode Island Office of the Attorney General at 150 South Main Street, Providence, RI 02903, www.riag.ri.gov, 401-274-4400.