

**Connell
Family Office &
Management, Inc.**

One International Place
Fort Hill Square, Suite 1870
Boston, MA 02110
Phone : 617 737 2700

March 23, 2026

Dear _____ :

Connell Family Office & Management, Inc. (“Connell”) writes to inform you of a recent event that may affect the confidentiality of certain information related to you. Although we have no indication of identity theft or fraud in relation to this event, we are providing you with information about our response and additional measures you can take to help protect your information, should you determine it is appropriate to do so.

The information impacted includes _____ and your name. We have no indication of misuse of this information, and we are notifying you in an abundance of caution.

Connell takes this event and the security of information in our care very seriously. Upon learning of the event, we moved quickly to investigate and respond, assess the security of our environment, and determine what information was potentially impacted. As part of our ongoing commitment to information security, we reviewed our existing policies and procedures to reduce the likelihood of a similar future event. As an added precaution, we are offering complimentary credit monitoring, identity restoration services, and identity theft insurance for three years through Experian.

To receive your complimentary Experian Identity Works membership, please contact Robert Soohoo at rsoohoo@connell-familyoffice.com or 617-391-5565 to obtain an activation code for registration on the Experian website.

The Experian website to register and activate the membership is <https://www.experianidworks.com/creditplus3b>
Please note that enrollment must be completed no later than June 30, 2026 11:59pm UTC.

Under U.S. law, a consumer is entitled to one free credit report annually from each of the three major credit reporting bureaus, Equifax, Experian, and TransUnion. To order your free credit report, visit www.annualcreditreport.com or call, toll-free, 1-877-322-8228. You may also directly contact the three major credit reporting bureaus listed below to request a free copy of your credit report.

Consumers have the right to place an initial or extended “fraud alert” on a credit file at no cost. An initial fraud alert is a one-year alert that is placed on a consumer’s credit file. Upon seeing a fraud alert display on a consumer’s credit file, a business is required to take steps to verify the consumer’s identity before extending new credit. If you are a victim of identity theft, you are entitled to an extended fraud alert, which is a fraud alert lasting seven years. Should you wish to place a fraud alert, please contact any one of the three major credit reporting bureaus listed below.

As an alternative to a fraud alert, consumers have the right to place a “credit freeze” on a credit report, which will prohibit a credit bureau from releasing information in the credit report without the consumer’s express authorization. The credit freeze is designed to prevent credit, loans, and services from being approved in your name without your consent. You should be aware, however, that using a credit freeze to take control over who gets access to the personal and financial information in your credit report may delay, interfere with, or prohibit the timely approval of any subsequent request or application you make regarding a new loan, credit, mortgage, or any other account involving the extension of credit. Pursuant to federal law, you cannot be charged to place or lift a credit freeze on your credit report. To request a security freeze, you may need to provide the following information, depending on whether you make the request online, by phone, or by mail:

1. Full name (including middle initial as well as Jr., Sr., II, III, etc.);
2. Social Security number;
3. Date of birth;
4. Addresses for the prior two to five years;
5. Proof of current address, such as a current utility bill or telephone bill;
6. A legible photocopy of a government-issued identification card (state driver's license or ID card, etc.);
7. Social Security Card, pay stub, or W2;
8. If you are a victim of identity theft, include a copy of either the police report, investigative report, or complaint to a law enforcement agency concerning identity theft.

Should you wish to place a credit freeze, please contact the three major credit reporting bureaus listed below:

Equifax	Experian	TransUnion
https://www.equifax.com/personal/credit-report-services/	https://www.experian.com/help/	https://www.transunion.com/credit-help
888-298-0045	1-888-397-3742	1 (800) 916-8800
Equifax Fraud Alert, P.O. Box 105069 Atlanta, GA 30348-5069	Experian Fraud Alert, P.O. Box 9554, Allen, TX 75013	TransUnion Fraud Alert, P.O. Box 2000, Chester, PA 19016
Equifax Credit Freeze, P.O. Box 105788 Atlanta, GA 30348-5788	Experian Credit Freeze, P.O. Box 9554, Allen, TX 75013	TransUnion Credit Freeze, P.O. Box 160, Woodlyn, PA 19094

Under Massachusetts law, you have the right to obtain any police report filed regarding this event. If you are the victim of identity theft, you also have the right to file a police report and obtain a copy of it.

You may further educate yourself regarding identity theft, fraud alerts, credit freezes, and the steps you can take to protect your personal information by contacting the consumer reporting bureaus, the Federal Trade Commission, or the Massachusetts Attorney General. The Federal Trade Commission may be reached at: 600 Pennsylvania Avenue NW, Washington, DC 20580; www.identitytheft.gov; 1-877-ID-THEFT (1-877-438-4338); and TTY: 1-866-653-4261. The Federal Trade Commission also encourages those who discover that their information has been misused to file a complaint with them. You can obtain further information on how to file such a complaint by way of the contact information listed above.

Massachusetts law limits the information about the event that can be included in this letter. If you have any questions, you may call us at 617-391-5565 or contact us via email at rsoohoo@connell-familyoffice.com.

Sincerely,

Connell Family Office & Management, Inc.