

Mail Code: OH4-VPC3  
3415 Vision Drive  
Columbus, OH 43219-6009

July 11, 2019

Name  
Address  
City, State Zip code

## Important Information: Important information regarding a privacy incident

**Reference Number:** PRI-12328989

Dear XXXX:

We are writing to notify you about an incident related to your personal and financial information.

### Here is what happened

We recently learned that we mistakenly linked your accounts to another client's online profile. The other party may have been able to view your monthly statements, which contain your name, address, and account numbers, as well as had access to your accounts online.

We unlinked your accounts from the online profile. We have no indication that your information has been or will be used inappropriately.

The privacy and security of your information are of paramount importance to us. We deeply regret any concern or inconvenience resulting from this issue and are committed to working with you to help minimize any potential impact.

### Important next steps

Please read the enclosed documents for additional information on protective measures you can take.

### For more information

If you have questions, please do not hesitate to contact your Financial Advisor directly at 617-654-2318; we accept operator relay calls.

Enclosed: Additional Steps to Help Protect Yourself document  
Important Information for Massachusetts Residents

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• NOT A DEPOSIT • NOT FDIC INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY • NO BANK GUARANTEE • MAY LOSE VALUE

## Additional Steps to Help Protect Yourself

### Place a one year fraud alert on your credit file

An initial one year fraud alert indicates to anyone requesting your credit file that you suspect you are a victim of fraud. When you or someone else attempts to open a credit account in your name, increase the credit limit on an existing account, or obtain a new card on an existing account, the lender should take steps to verify that you have authorized the request. If the creditor cannot verify this, the request should not be satisfied. You may contact one of the credit reporting companies below for assistance.

#### Equifax

PO Box 105069  
Atlanta, GA 30348  
1-800-525-6285  
equifax.com

#### Experian

PO Box 9554  
Allen, TX 75013  
1-888-397-3742  
experian.com

#### TransUnion

PO Box 2000  
Chester, PA 19016  
1-800-680-7289  
transunion.com

### Place a security freeze on your credit file

If you are very concerned about becoming a victim of fraud or identity theft, a security freeze might be right for you. Placing a security freeze on your credit report will prevent lenders and others from accessing your credit report, which will prevent them from extending credit. It may also delay, interfere with, or prevent the timely approval of any requests you make for new loans, credit, mortgages, employment, housing or other services. With a security freeze in place, you will be required to take special steps when you wish to apply for any type of credit. This process is also completed through each of the three credit reporting companies.

### Order your free annual credit reports

Visit [www.annualcreditreport.com](http://www.annualcreditreport.com) or call 1-877-322-8228. Once you receive your credit reports, review them for discrepancies. Identify any accounts you did not open or inquiries from creditors that you did not authorize. Verify all information is correct. If you have questions or notice incorrect information, contact the credit reporting company.

### Manage your personal information

Take steps such as carrying only essential documents with you, being aware of whom you are sharing your personal information with and shredding receipts, statements and other sensitive information, as well as utilizing anti-virus software on your computer while keeping it updated.

### Use tools to monitor your credit and financial accounts

Carefully review your credit reports and bank, credit card and other account statements. Be proactive and create alerts on credit cards and bank accounts to notify you of activity. If you discover unauthorized or suspicious activity on your credit report or by any other means, file an identity theft report with your local police and contact a credit reporting company.

Contact your J.P. Morgan team to report any unauthorized transactions. We can provide copies of past statements at no cost to you and will work with you to close your account(s) and open new ones, with new account numbers.

### Obtain more information about identity theft and ways to protect yourself

- Visit [experian.com/blogs/ask-experian/category/credit-advice/fraud-and-identity-theft/](http://experian.com/blogs/ask-experian/category/credit-advice/fraud-and-identity-theft/) for general information regarding protecting your identity.
- The Federal Trade Commission has an identity theft hotline, which you can reach by calling 877.438.4338 or 866.653.4261 (TTY). They also provide information online at [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft).

## Important Information for Massachusetts Residents



Massachusetts law allows you to place a security freeze on your credit report. This prohibits a credit reporting agency from releasing any information about your credit report without your written authorization. **However, placing a security freeze also may delay, interfere with, or prevent the timely approval of any requests you make for new loans, credit, mortgages, employment, housing or other services.** You can place a security freeze on your credit report free of charge.

If you are the victim of identity theft, you have the right to file a police report and obtain a copy.

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For instructions on how to place a security freeze, visit the websites of all three major credit reporting agencies, call or write them.

**Equifax Security Freeze**

PO Box 105788  
Atlanta, GA 30348  
1-800-349-9960  
[equifax.com](http://equifax.com)

**Experian Security Freeze**

PO Box 9554  
Allen, TX 75013  
1-888-397-3742  
[experian.com](http://experian.com)

**TransUnion Security Freeze**

PO Box 2000  
Chester, PA 19016  
1-888-909-8872  
[transunion.com](http://transunion.com)

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**When requesting a security freeze, you may need to include the following:**

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- Your full name, with middle initial as well as Jr., Sr., II, etc.
- Social Security number
- Date of birth
- Current address and all addresses for the past two years
- Proof of current address such as a current utility bill or telephone bill
- Legible copy of a government-issued identification card, such as a state driver's license, state identification card, or military identification



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