



1000 LEGION PLACE, SUITE 1700 • ORLANDO, FL 32801  
PHONE: 407-581-9800 • FAX: 407-581-9801

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[DATE]

[CLIENT]  
[ADDRESS]  
[CITY, STATE, ZIP]

Client Id.: [CLIENTID]

Re: Notice of Breach of Personal Information Pursuant to Section 501.171, Florida Statutes, On Behalf of Tax & Business Solutions, CPA & Co., LLC

Dear [CONTACTNAME],

Our law firm has the honor of representing Tax & Business Solutions, CPA & Co., LLC (“Tax & Business”), and this communication shall serve as a Notice of Security Breach of Personal Information pursuant to Section 501.171(4), Florida Statutes. Since we represent Tax & Business, we cannot provide you with legal advice concerning this matter.

We do not have evidence that any information has been misused due to this breach incident. Out of an abundance of caution, we are notifying you of this incident and offering you the resources discussed below so that you can take certain precautionary steps to protect yourself.

### **What happened?**

In March 2023, Tax & Business acquired the assets of B & S Accounting and Tax Services, LLC (“B & S”), including all B & S Clients, which called for, in part, the migration of B & S client data to the servers of Tax & Business to begin in July 2023. On November 3, 2023, Tax & Business first learned of a potential security breach of the data of former B & S clients kept on a third-party-based server by B & S. No client data of Tax & Business clients was involved in this security incident.

Upon this discovery, Tax & Business immediately took steps to secure their system and investigate this incident with the assistance of external cybersecurity experts. This investigation concluded on December 12, 2023, and discovered malware was installed on one or more B & S computers belonging to B & S by foreign actors. During this period, an unidentified third party downloaded client data. Immediately upon discovery, Tax & Business took immediate measures that successfully secured all computers and servers, and ensured no further vulnerabilities existed.

### **What information was involved?**

The types of affected information are different for each individual and may include name, address, date of birth, social security information, routing and bank account numbers, financial institution username(s) and password(s) provided by clients, and other client provided information related to the electronic filling of state and federal tax returns. **At present, we have no evidence that any information has been misused because of the incident.**

### **What is Tax & Business doing in response?**

Tax & Business takes the security of information that their clients provide seriously. Upon discovery of a potential incident, Tax & Business retained data breach investigation experts, reviewed and further secured their systems, conducted an investigation with the assistance of third-party cybersecurity experts, and filed a report with the Federal Bureau of Investigations and other law enforcement agencies. Along with the undersigned counsel, Tax & Business has also facilitated notice to privacy regulators, state Attorneys General, and other parties, as required by law.

As part of their ongoing commitment to the security of information in the care of Tax & Business, they have implemented additional safeguards, security measures, and best practices to further enhance client data security.

Finally, Tax & Business believes it is important that you have the necessary information so that you can take steps to help protect yourself from the threat of identity theft. We encourage you to remain vigilant, regularly review and monitor relevant account statements and credit reports, and report suspected incidents of identity theft to local law enforcement, your state's Attorney General, or the Federal Trade Commission. To assist, we have enclosed information about steps you can take to protect yourself. Please see attached *Additional Important Information* on the following page.

### **Moving forward**

Tax & Business is committed to maintaining the privacy and security of all the information in its custody and control. They sincerely regret that this incident occurred, and since then, Tax & Business has deployed extensive resources to understand what happened, further enhance safeguards, and comprehensively review the exposure of client data.

Tax & Business has authorized our firm to serve as their agent for purposes of future contact or inquiry concerning this matter. To assist you with questions regarding this incident, you can contact our law firm by calling 407-581-9800 between the hours of 9:00 a.m. and 5:00 p.m. Eastern Standard Time, Monday to Friday, or by sending an email message to [DataSecurity@shuffieldlowman.com](mailto:DataSecurity@shuffieldlowman.com), including the Client ID contained at the top of this correspondence.

Regards,

A handwritten signature in black ink, appearing to read "Ryan Vescio". The signature is written in a cursive style with a horizontal line at the end.

Ryan J. Vescio, Esq.

## ADDITIONAL IMPORTANT INFORMATION

**Fraud Alerts:** You can place fraud alerts with the three credit bureaus by phone and online with Equifax ([https://assets.equifax.com/assets/personal/Fraud\\_Alert\\_Request\\_Form.pdf](https://assets.equifax.com/assets/personal/Fraud_Alert_Request_Form.pdf)); TransUnion (<https://www.transunion.com/fraud-alerts>); or Experian (<https://www.experian.com/fraud/center.html>). A fraud alert tells creditors to follow certain procedures, including contacting you, before they open any new accounts or change your existing accounts. For that reason, placing a fraud alert can protect you, but it may also delay you when you seek to obtain credit. Initial fraud alerts last for one year. Victims of identity theft can also get an extended fraud alert for seven years. The phone numbers for all three credit bureaus are below.

**Security Freezes:** You can also place a security freeze on your credit report. A security freeze is intended to prevent credit, loans, and services from being approved in your name without your consent. To place a security freeze on your credit report, you must request each consumer reporting agency by certified mail, overnight mail, regular stamped mail, or by following the instructions found at the websites listed below. The following information must be included when requesting a security freeze (note that if you are requesting a credit report for your spouse or a minor under the age of 16, this information must be provided for him/her as well): (1) full name, with middle initial and any suffixes; (2) Social Security number; (3) date of birth; (4) current address and any previous addresses for the past five years; and (5) any applicable incident report or complaint with a law enforcement agency or the Registry of Motor Vehicles. The request must also include a copy of a government-issued identification card and a copy of a recent utility bill or bank or insurance statement. It is essential that each copy be legible and display your name and current mailing address, and the date of issue. It is free to place, lift, or remove a security freeze. You may also place a security freeze for children under the age of 16. You may obtain a free security freeze by contacting any one or more of the following national consumer reporting agencies:

**Equifax Security Freeze**

P.O. Box 105788  
Atlanta, GA 30348  
[equifax.com/personal/credit-report-services/](https://equifax.com/personal/credit-report-services/)  
1-800-349-9960

**Experian Security Freeze**

P.O. Box 9554  
Allen, TX 75013  
[experian.com/freeze/center.html](https://experian.com/freeze/center.html)  
1-888-397-3742

**TransUnion Security Freeze**

P.O. Box 160  
Woodlyn, PA 19094  
[transunion.com/credit-freeze](https://transunion.com/credit-freeze)  
1-888-909-8872

**Monitoring:** You should always remain vigilant, review your financial statements, and monitor your accounts for suspicious, unusual, or unauthorized activity.

**For residents of *Hawaii, Michigan, Missouri, North Carolina, Vermont, Virginia, and Wyoming:*** It is recommended by state law that you remain vigilant for incidents of fraud and identity theft by reviewing credit card account statements and monitoring your credit report for unauthorized activity.

**For Illinois, Iowa, Maryland, Missouri, North Carolina, Oregon, and West Virginia residents:** You may obtain a copy of your credit report, free of charge, whether or not you suspect any unauthorized activity on your account. You may obtain a free copy of your credit report from each of the three nationwide credit reporting agencies. To order your free credit report, follow the instructions above. You can also order your annual free credit report by mailing a completed Annual Credit Report Request Form (<https://www.consumer.ftc.gov/articles/0155-free-credit-reports>) to Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA, 30348-5281.

**For residents of *Vermont:*** If you do not have internet access but would like to learn more about how to place a security freeze on your credit report, contact the Vermont Attorney General's Office at 802-656-3183 (800-649-2424 toll-free in Vermont only).

**For residents of *New Mexico:*** Individuals interacting with credit reporting agencies have rights under the Fair Credit Reporting Act. We encourage you to review your rights by visiting [https://files.consumerfinance.gov/f/documents/bcfp\\_consumer-rights-summary\\_2018-09.pdf](https://files.consumerfinance.gov/f/documents/bcfp_consumer-rights-summary_2018-09.pdf) or by requesting

information in writing from the Consumer Financial Protection Bureau, 1700 G Street N.W., Washington, DC 20552.

**For Residents of *Washington, D.C.*:** You can obtain information about steps to take to avoid identity theft from the Office of the Attorney General for the District of Columbia at: 441 4th Street, NW, Washington, DC 20001; 202-727-3400; [www.oag.dc.gov](http://www.oag.dc.gov).

**For residents of *Iowa*:** State law advises you to report any suspected identity theft to law enforcement or to the Attorney General.

**For residents of *Oregon*:** State laws advise you to report any suspected identity theft to law enforcement, including the Attorney General and the Federal Trade Commission.

**For residents of *Massachusetts and Rhode Island*:** You have the right to obtain a police report if you are a victim of identity theft.

**For residents of *Maryland, Rhode Island, Illinois, New York, and North Carolina*:** You can obtain information from the Maryland and North Carolina Offices of the Attorney General and the Federal Trade Commission about fraud alerts, security freezes, and steps you can take toward preventing identity theft:

- **Federal Trade Commission** Consumer Response Center, 600 Pennsylvania Ave, NW Washington, DC 20580 1-877-IDTHEFT (438-4338) [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft)
- **Maryland Office of the Attorney General** Consumer Protection Division, 200 St. Paul Place, Baltimore, MD 21202 1-888-743-0023 [www.oag.state.md.us](http://www.oag.state.md.us)
- **Rhode Island Office of the Attorney General** Consumer Protection, 150 South Main Street, Providence, RI 02903 1-401-274-4400 [www.riag.ri.gov](http://www.riag.ri.gov)
- **North Carolina Office of the Attorney General** Consumer Protection Division, 9001 Mail Service Center, Raleigh, NC 27699-9001 1-877-566-7226 [www.ncdoj.com](http://www.ncdoj.com)
- **New York Office of Attorney General** Consumer Frauds & Protection, The Capitol, Albany, NY 12224 1-800-771-7755 <https://ag.ny.gov/consumer-frauds/identity-theft>