



KEY PLANNING
FINANCIAL ADVISORY & TAX PLANNING
2800 Shallowford Road Suite A
Atlanta, GA 30341

25862

Name of Consumer
Address
City, State, Zipcode

Notice of Data Security Incident

Dear <<First Name>> <<Last Name>>,

We are writing to inform you of a data security incident experienced by Key Planning (“Key Planning”) that may have impacted your personal information, including your [variable text]. We take the privacy and security of your information seriously, and sincerely apologize for any concern or inconvenience this may cause you. This letter contains information about resources we are making available to help you. We also want to assure you that we are taking steps to reduce the likelihood of this kind of event from happening in the future. Since the incident, email passwords were changed for all email accounts and multi-factor authentication has been enabled.

In addition, as a safeguard, we have secured the services of Kroll to provide identity monitoring at no cost to you for two years. Kroll is a global leader in risk mitigation and response, and their team has extensive experience helping people who have sustained an unintentional exposure of confidential data. Your identity monitoring services include Credit Monitoring, Fraud Consultation, and Identity Theft Restoration.

Visit <<IDMonitoringURL>> to activate and take advantage of your identity monitoring services.

You have until <<Date>> to activate your identity monitoring services.

Membership Number: <<Member ID>>

Additional information describing your services is included with this letter.

You should know that you have the right to obtain a police report. In addition, Massachusetts law also allows consumers to place a security freeze on their credit reports. A security freeze prohibits a credit reporting agency from releasing any information from a consumer’s credit report without written authorization. However, please be aware that placing a security freeze on your credit report may delay, interfere with, or prevent the timely approval of any requests you make for new loans, credit mortgages, employment, housing or other services.

Placing a freeze on your credit report is now free for all United States citizens. To place a security freeze on your credit report, each of the three major consumer credit reporting agencies have a dedicated web page for security freezes and fraud alerts:

Equifax: <https://www.equifax.com/personal/credit-report-services/credit-freeze/>

Experian: <https://www.experian.com/freeze/center.html>

TransUnion: <https://www.transunion.com/credit-freeze>

You can also request a freeze by phone or by mail to each of the three major consumer reporting agencies: Equifax (www.equifax.com); Experian (www.experian.com) and TransUnion (www.transunion.com) by regular, certified or overnight mail at the addresses below:

Equifax Security Freeze
U.S. Consumer Services
P.O. Box 105788
Atlanta, GA 30348
(800) 349-9960

Experian Security Freeze
P.O. Box 9554
Allen, TX 75013
1 888 397 3742

TransUnion Security Freeze
Fraud Victim Assistance
Department
P.O. Box 6790
Fullerton, CA 92834
888-909-8872

If a request is made online or by phone then the credit reporting agency must put the freeze in place no later than the next business day. In order to request a security freeze, you may need to provide the following information:

1. Your full name (including middle initial as well as Jr., Sr., II, III, etc.);
2. Social Security Number;
3. Date of birth;
4. If you have moved in the past five years, provide the addresses where you have lived over the prior 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, military identification, etc.);
7. If you are a victim of identity theft, include a copy of the police report, investigative report, or complaint to a law enforcement agency concerning identity theft;

If the request is made online or by phone, a credit bureau must lift a freeze within one (1) hour. If the request is made by mail, the credit reporting agencies have three (3) business days after receiving your request to place a security freeze on your credit report. The credit bureaus must also send written confirmation to you within five (5) business days and provide you with a unique personal identification number (PIN) or password, or both that can be used by you to authorize the removal or lifting of the security freeze.

To lift the security freeze in order to allow a specific entity or individual access to your credit report, you must go to the website provided above, call the toll-free number, or send a written request to the credit reporting agencies by mail. You will need proper identification (name, address, date of birth and social security number). Depending on the method you use, a PIN or password provided to you when you placed the security freeze may be required as well. You may also need to identify the entities or individuals you would like to receive your credit report or the specific period of time you want the credit report available.

To remove the security freeze, you must go to the websites provided above, call the toll-free number, or send a written request to each of the three credit bureaus by mail. You will need proper identification (name, address, date of birth and social security number). Depending on the credit reporting agency and method you used to freeze your credit, a PIN or password provided to you when you placed the security freeze may be required or requested.

It is always a good idea to remain vigilant for incident of identity theft or fraud, and to review your bank account and other financial statements as well as your credit reports for suspicious activity. We also encourage you to contact Kroll with any questions and to take full advantage of the Kroll service offering.

If you have any questions or concerns, please call [TFN] Monday through Friday from 8 am – 5:30 pm Central Time. Your trust is our top priority, and we deeply regret any inconvenience or concern that this matter may cause you.

Sincerely,

Tamala Williams

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TAKE ADVANTAGE OF YOUR IDENTITY MONITORING SERVICES

You have been provided with access to the following services from Kroll:

Single Bureau Credit Monitoring

You will receive alerts when there are changes to your credit data—for instance, when a new line of credit is applied for in your name. If you do not recognize the activity, you'll have the option to call a Kroll fraud specialist, who will be able to help you determine if it is an indicator of identity theft.

Fraud Consultation

You have unlimited access to consultation with a Kroll fraud specialist. Support includes showing you the most effective ways to protect your identity, explaining your rights and protections under the law, assistance with fraud alerts, and interpreting how personal information is accessed and used, including investigating suspicious activity that could be tied to an identity theft event.

Identity Theft Restoration

If you become a victim of identity theft, an experienced Kroll licensed investigator will work on your behalf to resolve related issues. You will have access to a dedicated investigator who understands your issues and can do most of the work for you. Your investigator will be able to dig deep to uncover the scope of the identity theft, and then work to resolve it.

Kroll's activation website is only compatible with the current version or one version earlier of Chrome, Firefox, Safari and Edge. To receive credit services, you must be over the age of 18 and have established credit in the U.S., have a Social Security number in your name, and have a U.S. residential address associated with your credit file.