



**BALARSKY & BEEBOUT**  
CERTIFIED PUBLIC ACCOUNTANTS

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March 25, 2023

**NOTICE OF DATA BREACH**

Dear Client:

I am writing to provide you with a formal notification regarding a data incident involving your tax file, which Balarsky & Beebout recently acquired from your former tax preparer, Wayne Walton. Although we do not believe your personal information is in any danger of misuse, this letter serves to provide additional information concerning the incident, what is being done to correct it, and what you can do to further protect your information.

**What Happened?**

In December 2021, Balarsky & Beebout purchased the practice of your former tax preparer, Wayne Walton, CPAs and, upon your written consent, you became a client of Balarsky & Beebout, CPAs. On February 2, 2023, we discovered that your former tax preparer retained your physical and electronic tax records without authorization by you. We have asked that he destroy the records because he is no longer your tax preparer, but he has not agreed to do so.

We have no information that your sensitive data has been misused in any manner. That said, we are taking appropriate precautionary measures to protect your financial security and to help alleviate concerns you may have. If you receive any notifications from the IRS concerning any suspicious activity on your account, please notify our office right away.

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**ROGER BEEBOUT**

P 916.921.2600

E ROGER@BB.CPA

6920 FAIR OAKS BLVD STE 205

PRINCIPAL

F 916.921.1485

W BALARSKYBEEBOUT.COM

CARMICHAEL, CA 95608



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**What Information Was Involved?**

If you are an individual, all information that was in your client file, which may have included your name, address, social security number, date of birth, telephone number(s), all employment (W-2) information, 1099 information, as well as direct deposit bank account information, including account number and routing information (if provided to us). Further, the information may have included supporting documentation such as brokerage statements and other types of specific documents you may also have provided to your tax preparer.

If you are an entity, all information that was in your client file, which may have included your company name, Federal Employer Identification Number, address, telephone number, employee and/or 1099-recipient information, partner, shareholder/officer or beneficiary names, addresses, social security numbers, and/or other information you may have also provided to us.

**What We Are Doing:**

We are taking measures to recover to files that were taken, and have asked Mr. Walton to destroy your records promptly. We have reported the incident to law enforcement, and are working with the authorities to ensure your data is recovered and protected. Further, we have notified and are working with the appropriate agencies on your behalf such as the IRS.

**What You Can Do:**

- We strongly recommend you be vigilant in reviewing your bank accounts and brokerage statements, as well as free credit reports.
- We suggest you change any bank account numbers provided to us, and/or have a conversation with your bank regarding the monitoring they can provide. It is also recommended that you change your passwords on all accounts, bank and brokerage.
- We recommend you use one of the three major credit agencies below to place a 90-day fraud alert on your accounts. A fraud alert tells creditors to contact you before they open any new accounts or change your existing accounts.



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<p><b>Equifax</b> P.O. Box 105069 Atlanta, GA 30348 1-800-525-6285</p> <p><a href="https://www.equifax.com/personal/credit-report-services/credit-fraud-alerts/">https://www.equifax.com/personal/credit-report-services/credit-fraud-alerts/</a></p>	<p><b>Experian</b> P.O. Box 2002 Allen, TX 75013 1-888-397-3742</p> <p><a href="https://www.experian.com/fraud/center.html">https://www.experian.com/fraud/center.html</a></p>	<p><b>TransUnion</b> P.O. Box 2000 Chester, PA 19016 1-800-680-7289</p> <p><a href="https://fraud.transunion.com/fraudAlert/landingPage.jsp">https://fraud.transunion.com/fraudAlert/landingPage.jsp</a></p>
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- You may also want to consider contacting these three credit agencies at the telephone numbers above to place a credit freeze on your credit file. A credit freeze means potential creditors cannot get your credit report, making it less likely that an identify thief can open new accounts in your name. The cost to place and lift a freeze depends on state law. Find your State Attorney General's Office at [naag.org](http://naag.org) to learn more.
- You are also entitled to a free credit report every year from each of these three agencies at: [www.annualcreditreport.com](http://www.annualcreditreport.com).
- We also suggest you contact the IRS about getting an Identity Protection PIN to use with your Social Security Number for heightened security. You can do this by going to <https://www.irs.gov/identity-theft-fraud-scams/get-an-identity-protection-pin>.
- If you suspect identity theft, report it to law enforcement, including the Federal Trade Commission at <https://www.identitytheft.gov/#/> and the State Attorney General's Office at [naag.org](http://naag.org).
- You can obtain more information from the Federal Trade Commission about fraud alerts and security freezes. The Federal Trade Commission can be contacted as follows:

- **Federal Trade Commission**  
600 Pennsylvania Avenue, NW  
Washington, DC 20580  
1-202-326-2222  
<https://www.consumer.ftc.gov/>

The protection and privacy of our clients' information has always been a top priority for our firm. We extend our deepest apologies for any inconvenience this incident may have caused you.



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### **For More Information:**

We are committed to helping those people who may have been impacted by this unfortunate situation. Protecting your information is incredibly important to us, as is addressing this incident with the information and assistance you may need. If you have any questions or concerns, call Roger Beebout, at (916) 921-2600, or email at [support@bb.cpa](mailto:support@bb.cpa); or write 6920 Fair Oaks Blvd Ste 205, Carmichael, CA 95608.

Sincerely,

Roger Beebout,  
Balarsky & Beebout, CPAs

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