
Attorney General,

I am the owner of a CPA firm in Boulder Colorado. I am informing you that our firm had a system data breach from May 30, 2023 through August 23, 2023. We discovered on August 1, 2023 fraudulent 2022 tax returns were filed with the IRS on behalf of our clients. One of those clients is a resident of Maryland. Our cyber investigation determined that malware was downloaded on an employee's workstation by the bad guy. The compromised information includes the clients' name, address, date of birth and social security number. We have notified all affected clients, the IRS and our software and IT companies. We have filed a report with the Boulder Police Department. Additionally, a notification letter was sent to the affected clients. The letter sent to the Maryland client is attached.

Regards,

Rick M. Bedell, CPA

rick@brooksideadvisors.com



3223 Arapahoe Avenue #305

Boulder, CO 80303

Phone 303-440-8866

Fax 303-402-9040

Privileged & Confidential

This communication is intended for the recipient only. If you have received this transmission in error, please notify the sender by telephone or return e-mail and delete the original transmission and its attachments without reading or saving in any manner.

Disclaimer

Any accounting, business, or tax advice contained in this communication, including attachments and enclosures, is not intended as a thorough, in-depth analysis of specific issues or a substitute for a formal opinion, nor is it sufficient to avoid tax-related penalties. If desired, RM Bedell & Associates, PC would be pleased to perform the requisite research and provide you with a detailed written analysis. Such an engagement may be the subject of a separate engagement letter that would define the scope and limits of the desired consultation services.

Brookside Advisors
c/o Cyberscout
1 Keystone Ave., Unit 700
Cherry Hill, NJ 08003
«Keycode»



«firstName» «middleName» «lastName»
«Address1» «Address2»
«City», «State» «PostalCode»

November 8, 2023

Dear «firstName» «lastName»:

Please read this letter in its entirety.

You are receiving this letter because this year you were a victim of a false federal tax return filing. As a valued client of Brookside Advisors, we are committed to fully protecting all the information which you have entrusted to us. Starting in July, we were notified by Thomson Reuters, whose software we use to process tax returns, that your return was previously filed and accepted by the Internal Revenue Service authority. As a result of this breach, your name, address, Social Security Number and date of birth may have been compromised.

It is very important that you obtain an IP (Identity Protection) PIN from the IRS going forward. The initial process to register for the PIN will only take about 10-15 min. The PIN's are generated for each calendar year. Therefore, when you register for the PIN you will be provided a 2022 (calendar year) number. This number will not be needed since your return has already been filed. However, it registers you on the system. Then in January you will be able to log into your account and simply request the IP PIN for 2023 to be used next tax season.

Please follow this link to register for your IP PIN. [Get An Identity Protection PIN | Internal Revenue Service \(irs.gov\)](#).

What is Brookside Advisors doing to address this situation?

Brookside Advisors has made immediate enhancements to our systems, security and practices. Additionally, we have engaged appropriate experts to assist us in conducting a full review of our security practices and systems to ensure that enhanced security protocols are in place going forward. We are committed to helping those people who may have been impacted by this unfortunate situation.

In response to the incident, we are providing you with access to **Triple Bureau Credit Monitoring** services at no charge. These services provide you with alerts for twelve months from the date of enrollment when changes occur to any of one of your Experian, Equifax or TransUnion credit files. This notification is sent to you the same day that the change or update takes place with the bureau. In addition, we are providing you with proactive fraud assistance to help with any questions that you might have or in event that you become a victim of fraud. These services will be provided by Cyberscout through Identity Force, a TransUnion company specializing in fraud assistance and remediation services.

How do I enroll for the free services?

To enroll in Credit Monitoring services at no charge, please log on to <<URL>> and follow the instructions provided. When prompted please provide the following unique code to receive services: **<CODE HERE>** In order for you to receive the monitoring services described above, you must enroll within 90 days from the date of this letter. Enrollment requires an internet connection and e-mail account. Please note that when signing up for monitoring services, you may be asked to verify personal information for your own protection to confirm your identity.

What can I do on my own to address this situation?

If you choose not to use these services, we strongly urge you to do the following:

If you choose to place a fraud alert on your own, you will need to contact one of the three major credit agencies directly at:

Experian (1-888-397-3742)
P.O. Box 4500
Allen, TX 75013
www.experian.com

Equifax (1-800-525-6285)
P.O. Box 740241
Atlanta, GA 30374
www.equifax.com

TransUnion (1-800-680-7289)
P.O. Box 2000
Chester, PA 19016
www.transunion.com

Also, should you wish to obtain a credit report and monitor it on your own:

- **IMMEDIATELY** obtain free copies of your credit report and monitor them upon receipt for any suspicious activity. You can obtain your free copies by going to the following website: www.annualcreditreport.com or by calling them toll-free at 1-877-322-8228. (Hearing impaired consumers can access their TDD service at 1-877-730-4204.
- **Upon receipt of your credit report**, we recommend that you review it carefully for any suspicious activity.
- Be sure to promptly report any suspicious activity to Brookside Advisors.

You can also obtain more information from the Federal Trade Commission (FTC) about identity theft and ways to protect yourself. The FTC has an identity theft hotline: 877-438-4338; TTY: 1-866-653-4261. They also provide information on-line at www.ftc.gov/idtheft.

What if I want to speak with a specialist regarding this incident?

Representatives are available for 90 days from the date of this letter, to assist you with questions regarding this incident, between the hours of 8:00 a.m. to 8:00 p.m. Eastern time, Monday through Friday, excluding holidays. Please call the help line at 1-800-405-6108 and supply the fraud specialist with your unique code listed above.

While representatives should be able to provide thorough assistance and answer most of your questions, you may still feel the need to speak with Brookside Advisors regarding this incident. If so, please call Rick Bedell at 303-440-8866 Monday through Friday.

At Brookside Advisors, we take our responsibility to protect your personal information very seriously. We are deeply disturbed by this situation and apologize for any inconvenience.

Sincerely,



Rick Bedell, CPA
President

Brookside Advisors
3223 Arapahoe Ave, Suite 305
Boulder, CO 80303

Additional Important Information

For residents of Illinois, Iowa, Maryland, Missouri, North Carolina, Oregon, and West Virginia:

It is required by state laws to inform you that 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 by contacting any one or more of the following national consumer reporting agencies:

Equifax

P.O. Box 740241
Atlanta, GA 30374
1-800-685-1111
www.equifax.com

Experian

P.O. Box 22104
Allen, TX 75013
1-888-397-3742
www.experian.com

TransUnion

P.O. Box 2000
Chester, PA 19022
1-800-888-4213
www.transunion.com

You may also obtain a free copy of your credit report online at www.annualcreditreport.com, by calling toll-free 1-877-322-8228, or by mailing an Annual Credit Report Request Form (available at www.annualcreditreport.com) to: Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA, 30348-5281.

For residents of Maryland, North Carolina, and Illinois:

You can obtain information from the Maryland and North Carolina Offices of the Attorneys General and the Federal Trade Commission about fraud alerts, security freezes, and steps you can take toward preventing identity theft.

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	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	Oregon Office of the Attorney General Oregon Department of Justice 1162 Court St. NE Salem, OR 97301-4096 503-378-4400 https://www.doj.state.or.us/	Federal Trade Commission Consumer Response Center 600 Pennsylvania Avenue, NW Washington, DC 20580 1-877-IDTHEFT (438-4338) www.ftc.gov/bcp/edu/microsites/idtheft
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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

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

Federal Trade Commission

Consumer Response Center
600 Pennsylvania Avenue, NW
Washington, DC 20580
1-877-IDTHEFT (438-4338)
www.ftc.gov/bcp/edu/microsites/idtheft

For residents of all states:

Fraud Alerts: You can place fraud alerts with the three credit bureaus at one of the three major credit bureaus by phone and also via Experian's or Equifax's website. 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 also may delay you when you seek to obtain credit. The contact information for all three credit bureaus is below:

Monitoring: You should always remain vigilant and monitor your accounts for suspicious or unusual activity.

Security Freeze: You also have the right to place a security freeze on your credit report at no cost to you. 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 need to make a request to each consumer reporting agency. You may make that request by certified mail, overnight mail, or 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, 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, display your name and current mailing address, and the date of issue.

Equifax Security Freeze

P.O. Box 105788
Atlanta, GA 30348
https://www.freeze.equifax.com/Freeze/jsp/SFF_PersonalIDInfo.jsp

Experian Security Freeze

P.O. Box 9554
Allen, TX 75013
<https://www.experian.com/freeze/center.html>

TransUnion (FVAD)

P.O. Box 2000
Chester, PA 19016
<https://freeze.transunion.com>

More information can also be obtained by contacting the Federal Trade Commission listed above.