

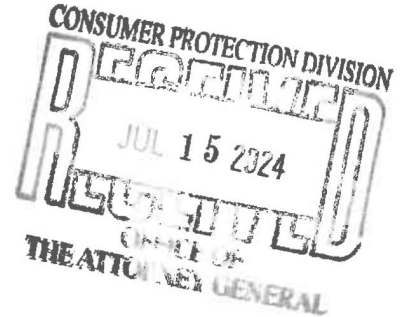


SORENSEN VANCE

Certified Public Accountants

June 27, 2024

Office of the Attorney General
Attn: Security Breach Notification
200 St. Paul Place
Baltimore, MD 21202



Dear Maryland Attorney General:

Pursuant to MD Commercial Code §14-3504 (h), we are writing to provide you with notice of a breach of our third-party vendor's security system.

The breach affected 4 Maryland residents. Between May 31, 2023 through July 13, 2023, there was unauthorized access to our third-party vendor's system, which we use to store data files. An unknown threat actor compromised a user account's credentials. We discovered the breach on July 15, 2023. Thereafter, we hired experts to investigate the unauthorized access to the third-party vendor.

We recently concluded our investigation of the nature and scope of the breach. As a result of the unauthorized access to the third-party provider's system, customers' name, gender, date of birth, telephone number(s), address, social security number, employment (W-2) information, 1099 information, company name, Federal Employer Identification, employee and/or 1099-recipient information, partner, shareholder/officer or beneficiary names, as well as direct deposit bank account information, including account number and routing information (if provided to us), and other financial information may have been compromised. Further, the information may have included supporting documentation such as brokerage statements and other types of specific documents.

Our software provider has restricted access to the data by limiting access to certain IP addresses and implementing dual factor authentication.

Notice to our affected customers was sent via U.S. Mail. A sample of that notice is attached.

Sincerely,


Sorensen, Vance & Company, P.C.

Sorensen, Vance & Company, PC

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]



SORENSEN VANCE

Certified Public Accountants

[REDACTED]
[REDACTED]
[REDACTED]

October 17, 2023

Please read this letter in its entirety.

Dear [REDACTED],

Recently, we became aware of unauthorized access to the computer system of a third-party provider we use to store data files. At this time, we have no information that our network's security has been breached, and an investigation is underway to determine the scope of the unauthorized access to the third-party vendor's system. As a result of this unauthorized access, your name, address, social security number, and financial information may have been compromised.

WHAT IS BEING DONE

We have hired experts to investigate the unauthorized access to the third-party vendor. If this investigation results in additional relevant information, we will notify you in a subsequent letter. In the meantime, the software provider has restricted access to the data in a way that will block unauthorized access at a minimal inconvenience to us.

HOW WE WILL HELP

To protect you, we will prepare a Form 14039, Identity Theft Affidavit for you to sign and mail to the IRS. This form will put the IRS on notice that you may be a victim of identity theft and enhance the security related to your account. You will not be charged for the preparation of this form.

Additionally, we are providing you with access to Triple Bureau Credit Monitoring, Triple Bureau Credit Report and Triple Bureau Credit Score services at no charge to you. These three services provide you with alerts for twelve (12) 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. 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, please log on to <https://secure.identityforce.com/benefit/sorensenvance> and follow the instructions provided. When prompted please provide the following unique code to receive services:

[REDACTED]

In order for you to receive the monitoring services described above, you must enroll within 90 days from the date of this letter. The enrollment requires an internet connection and e-mail account and may not be available to minors under the age of 18 years of age. 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 YOU SHOULD DO

In addition to monitoring your credit, you should do the following:

- If you receive an IRS notice, please contact us immediately.
- Freeze your credit at the three credit agencies - TransUnion www.transunion.com, Equifax www.equifax.com, and Experian www.experian.com. This process is surprisingly simple and only takes 20 to 30 minutes to complete.
- Consider notifying your bank(s) and investment advisor(s) to see if they have any suggestions to enhance the security on your accounts.

If you choose not use the credit monitoring services, you may want 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:

- You can obtain a free copy of your credit report 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 Sorensen, Vance & Company, P.C.

This is one letter we were hoping to never have to write. Seventeen years ago, we made the decision to store the majority of our data files with a third-party vendor to take advantage of their enhanced security and backup capabilities. Despite this current incident, we still believe this is the best course of action to protect our client's data from the many pitfalls that exist today. Although we are not privy to the specifics of our third-party vendor's security procedures, we feel confident they have addressed the security vulnerability. We apologize for any inconvenience this situation has caused or may cause in the future. We appreciate your business and will remain diligent in the protection of your financial and tax information.

Sincerely,

Sorensen, Vance & Company, P.C.

Sorensen, Vance & Company, PC
c/o Cyberscout
555 Monster Rd SW
Renton, WA 98057
DB-07778



SORENSEN VANCE
Certified Public Accountants



June 14, 2024

NOTICE OF DATA BREACH

Please read this letter in its entirety.

Dear 

We wrote to you in October of 2023 to inform you of unauthorized access to the computer system of a third-party provider we use to store data files. As you may recall, we informed you that an investigation was being conducted to determine the scope of the unauthorized access to the third-party vendor's system. We write to you now to inform you that our investigation has concluded. Below is information you may have already received and additional information following our investigation.

WHAT HAPPENED

On July 15, 2023, we became aware of unauthorized access to the third-party vendor's system, which we now know occurred between May 31, 2023 through July 13, 2023. We still have no information that our network's security was breached.

As a result of this unauthorized access to the third-party provider's system, your name, gender, date of birth, telephone number(s), address, social security number, employment (W-2) information, 1099 information, as well as direct deposit bank account information, including account number and routing information (if provided to us), and other financial information may have been compromised. Further, the information may have included supporting documentation such as brokerage statements and other types of specific documents you may also have provided to us.

WHAT WE HAVE DONE

We have taken the following steps to protect you:

- Hired experts to investigate the unauthorized access to the third-party vendor.

- Worked with the software provider to further restrict access to the data in a way that will block unauthorized access at minimal inconvenience to us.
- Enrolled in the IRS Practitioner Relief Program which allowed us to provide the IRS with a list of taxpayers who might be affected by the data breach and also gave us access to IRS specialists to help clear notices and other related account matters.
- Offered you Triple Bureau Credit Monitoring, Triple Bureau Credit Report, and Triple Bureau Credit Score.

WHAT YOU SHOULD DO

If you have not done so already, in addition to monitoring your credit, you should do the following:

- If you receive an IRS notice, please contact us immediately.
- Freeze your credit at the three credit agencies - TransUnion www.transunion.com, Equifax www.equifax.com, and Experian www.experian.com. This process is surprisingly simple and only takes 20 to 30 minutes to complete.
- Consider notifying your bank(s) and investment advisor(s) to see if they have any suggestions to enhance the security on your accounts.
- Remain vigilant by reviewing your account statements.

If you chose not to use the credit monitoring services, you may want 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:

- You can obtain a free copy of your credit report 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 Sorensen, Vance & Company, P.C.

You can also obtain information from the above three major credit agencies and Federal Trade Commission about fraud alerts and security freezes.

You can obtain assistance with steps to avoid identity theft and other identity theft matters from the Federal Trade Commission and your Attorney General's Office. The Federal Trade Commission can be contacted as follows:

- **Federal Trade Commission**

600 Pennsylvania Avenue, NW
Washington, DC 20580
1-877-382-4357
<https://www.consumer.ftc.gov/>

The Maryland Attorney General's Office can be contacted as follows:

- **Maryland Attorney General**

200 St. Paul Place, Baltimore,
MD 21202
1-888-743-0023
<https://www.marylandattorneygeneral.gov/>

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 Katie Constantine, who is overseeing the reporting of the breach, at [REDACTED], or email at [REDACTED] or write to:

Katie Constantine
3115 E. Lion Lane, Suite 220
Salt Lake City, UT 84121

Again, we apologize for any inconvenience this situation has caused, or may cause in the future. We appreciate your business and will remain diligent in the protection of your financial and tax information.

Sincerely,

Doug Hardy

Sorensen, Vance & Company, P.C.



SORENSEN VANCE

Certified Public Accountants

June 27, 2024

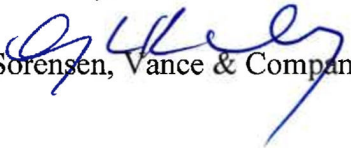
Office of the Attorney General
Justice Building, Third Floor
215 North Sanders
P.O. Box 201401
Helena, MT 59620-1401
ocpdatabreach@mt.gov

Dear Montana Attorney General:

Pursuant to Montana Code Annotated section 30-14-1704, we are writing to provide you with notice of a breach of our third-party vendor's security system.

Two Montana residents were affected. Attached is a copy of the notice that was sent to our Montana customers on October 17, 2023 via U.S. Mail.

Sincerely,


Sorensen, Vance & Company, P.C.

Sorensen, Vance & Company, PC
c/o Cyberscout
555 Monster Rd SW
Renton, WA 98057
DB-07778



SORENSEN VANCE
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June 14, 2024

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Atlanta, GA 30374
www.equifax.com

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Chester, PA 19016
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Doug Hardy

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