

News & Events

Notification of Data Security Incident

9/28/2026 – Bee, Bergvall & Co has become aware of a data security incident that may have affected certain individuals’ information.

On or around October 14, 2025, Bee, Bergvall & Co became aware of certain unauthorized activity within its computer systems. Upon discovery, Bee, Bergvall & Co immediately secured its network and swiftly engaged a third-party team of forensic investigators in order to determine the full nature and scope of the incident. As part of our investigation, Bee, Bergvall & Co learned that certain information within its systems was subject to unauthorized access for a limited period of time. Upon discovery, Bee, Bergvall & Co worked to identify and collect the data at risk and began a thorough review to determine the types of information that may have been impacted, the individuals to whom it relates, and up-to-date address information in order to provide notification.

On August 28, 2026, this process was completed and Bee, Bergvall & Co determined certain personal information may have been impacted. The types of information contained within the potentially affected data may have included individual’s first and last name, in combination with the following data elements: date of birth, driver’s license/state issued identification number, health insurance information, medical information, financial account information, passport number, taxpayer ID number, payment card information, other government issued ID number, and/or Social Security number.

In response to this event, Bee, Bergvall & Co immediately took steps to secure its systems and undertook a thorough investigation. Bee, Bergvall & Co has also implemented additional technical safeguards to further enhance the security of information in its possession and to prevent similar incidents from happening in the future. Out of an abundance of caution, Bee, Bergvall & Co is notifying potentially affected individuals and offering complimentary credit monitoring services to those whose information may have been involved.

Although Bee, Bergvall & Co has no evidence of actual or attempted misuse of information as a result of this incident, Bee, Bergvall & Co encourages individuals to remain vigilant against incidents of identity theft and fraud by reviewing your credit reports and account statements for suspicious activity and to detect errors. If suspicious or unusual activity on accounts is discovered, please promptly contact the financial institution or company. Individuals may also place a fraud alert or credit freeze by contacting the credit reporting agencies: TransUnion 1-800-680-7289; Experian 1-888-397-3742; Equifax 1-888-298-0045.

Individuals can further educate themselves regarding identity theft, fraud alerts, credit freezes, and steps to protect their personal information by contacting the credit reporting bureaus, the Federal Trade Commission (“FTC”), or their state Attorney General. The FTC may be reached at 600 Pennsylvania Ave. NW, Washington, D.C. 20580; www.identitytheft.gov; 1-877-ID-THEFT (1-877-438-4338); and TTY: 1-866-653-4261. Instances of known or suspected identity theft should also be reported to law enforcement, your state Attorney General, and the FTC.

Should you have additional questions or concerns regarding this matter, please do not hesitate to contact the dedicated call center setup by Bee, Bergvall & Co at <<Call Center Number>> between 8 a.m. and 8 p.m. Eastern Time, Monday–Friday, excluding major U.S. holidays, or write us at 936 Easton Road, Warrington, PA 18976.

The privacy and protection of information is a top priority for Bee, Bergvall & Co, and we deeply regret any inconvenience or concern this incident may cause.

STEPS YOU CAN TAKE TO HELP PROTECT YOUR INFORMATION

Monitor Your Accounts

We encourage you to remain vigilant against incidents of identity theft and fraud by reviewing your credit reports/account statements and explanation of benefits forms for suspicious activity and to detect errors. Under U.S. law, you are entitled to one free credit report annually from each of the three major credit reporting bureaus, TransUnion, Experian, and Equifax. To order your free credit report, visit www.annualcreditreport.com or call 1-877-322-8228. Once you receive your credit report, review it for discrepancies and identify any accounts you did not open or inquiries from creditors that you did not authorize. If you have questions or notice incorrect information, contact the credit reporting bureau.

You have the right to place an initial or extended “fraud alert” on a credit file at no cost. An initial fraud alert is a one-year alert that is placed on a consumer’s credit file. Upon seeing a fraud alert, a business is required to take steps to verify the consumer’s identity before extending new credit. If you are a victim of identity theft, you are entitled to an extended fraud alert lasting seven years. Should you wish to place a fraud alert, please contact any of the three credit reporting bureaus listed below.

As an alternative to a fraud alert, you have the right to place a “credit freeze” on a credit report, which will prohibit a credit bureau from releasing information in the credit report without your express authorization. The credit freeze is designed to prevent credit, loans, and services from being approved in your name without your consent. However, you should be aware that using a credit freeze may delay, interfere with, or prohibit the timely approval of any subsequent request or application you make regarding a new loan, credit, mortgage, or any other account involving the extension of credit. Pursuant to federal law, you cannot be charged to place or lift a credit freeze on your credit report. To request a credit freeze, you will need to provide the following information:

1. Full name (including middle initial as well as Jr., Sr., III, etc.);
2. Social Security number;
3. Date of birth;
4. Address for the prior two to five years;
5. Proof of current address, such as a current utility or telephone bill;
6. A legible photocopy of a government-issued identification card (e.g., state driver’s license or identification card); and
7. A copy of either the police report, investigative report, or complaint to a law enforcement agency concerning identity theft, if you are a victim of identity theft.

Should you wish to place a fraud alert or credit freeze, please contact the three major credit reporting bureaus listed below:

Credit Agencies for Monitoring

Additional Information

You can further educate yourself regarding identity theft, fraud alerts, credit freezes, and the steps you can take to protect your personal information by contacting the credit reporting bureaus, the Federal Trade Commission (FTC), or your state Attorney General. The FTC also encourages those who discover that their information has been misused to file a complaint with them. The FTC may be reached at 600 Pennsylvania Ave. NW, Washington, D.C. 20580; www.identitytheft.gov; 1-877-ID-THEFT (1-877-438-4338); and TTY: 1-866-653-4261.

You have the right to file a police report if you ever experience identity theft or fraud. Please note that in order to file a report with law enforcement for identity theft, you will likely need to provide some proof that you have been a victim. Instances of known or suspected identity theft should also be reported to law enforcement, your state Attorney General, and the FTC. This notice has not been delayed by law enforcement.

Standard Mileage Rates Raised for Second Half of 2026

Higher fuel prices prompted the IRS to raise the business, medical, and qualified moving rates for mileage on or after July 1, 2026.

Beginning July 1, 2026, the optional standard mileage rates for the use of a car, van, pickup, or panel truck will be:

- 76 cents per mile driven for business use, up from 72.5 cents.
- 23.5 cents per mile driven for medical purposes, up from 20.5 cents.
- 23.5 cents per mile driven for moving purposes by eligible active-duty members of the Armed Forces and certain members of the intelligence community, up from 20.5 cents.
- 14 cents per mile driven for charitable miles (unchanged).

The revised rates apply to eligible transportation expenses paid or incurred on or after July 1, 2026. The rates originally announced for 2026 continue to apply to expenses paid or incurred from January 1 through June 30, 2026.

SCAM ALERT

Please be cautious when responding to IRS notices as there are a number of bad actors out there.

Of particular note, the is the CP53E Notice. The CP53E Notice is sent when the IRS cannot issue your tax refund via direct deposit, and scammers are taking advantage of this.

If you receive an IRS notice-especially if it has a QR Code directing you to enter personal information, you should proceed with caution.

If you receive an IRS notice of any kind and are unsure whether it is legitimate, please contact our firm and your preparer before taking action. We can help you verify the notice, confirm what it requires, and respond appropriately.

How to Verify a CP53E or any IRS Notice

There are three reliable ways to confirm whether a notice is legitimate:

- **Log into your IRS Online Account.** A copy of any real notice will appear in your secure file at irs.gov/payments/your-online-account.
- **Call the IRS directly.** The official number is 1-800-829-1040.
- **Check refund status.** Use the official [Where’s My Refund?](#) tool on irs.gov.