



April 1, 2009

Attorney General Kelly A. Ayotte
New Hampshire Dept. of Justice
33 Capitol Street
Concord, NH 03301

Dear Attorney General Ayotte:

In accordance with New Hampshire law, this letter serves as notification by Massachusetts Financial Services Company of the nature and circumstances of a recent data security incident. Specifically, on February 23, 2009, an MFS customer brought to our attention an error in our online tax reporting system. This error inadvertently caused the U.S. Form 1099 tax forms of certain MFS accounts that were not related to each other to be available for viewing by an owner of one or more of these accounts. The information included on the tax form was limited to the customer's name, address, account number, and certain tax reporting amounts. The tax forms did not include any social security or tax identification numbers. Our records reflect that the tax forms of two non-resident alien customers with mailing addresses in New Hampshire were among the forms that were available for viewing. Please also note that our records reflect that the group of linked accounts was only accessed by the customer who alerted us to the error.

We have subsequently removed the tax forms from our online tax reporting system and have increased the monitoring applied to the customers' accounts. Based on our review and investigation of the incident, we have no reason to believe the information disclosed on the tax forms will be misused. Attached please find a copy of the notice that we will be providing to affected customers.

If you have any questions, please call me at (617) 954-5238 any business day between 9:00 a.m. and 5:00 p.m. EST.

Sincerely,

A handwritten signature in cursive script that reads "Barbara M. Houlihan".

Barbara M. Houlihan
Vice President/Chief Risk Officer
MFS Investment Management,
Corporate Risk & Compliance

Enclosure(s): Form of notice to
affected customers



[date]

[shareholder name]

[address]

[account number]

Equifax Promotion Code: [#####]

On February 23, 2009, an MFS customer brought our attention to an error in our online tax reporting system that inadvertently caused the U.S. Form 1099 tax forms of certain MFS accounts that were not related to each other to be available for viewing by an owner of one or more of these accounts. The tax form(s) related to the above-referenced account(s) were among the forms that were available for viewing. The information included on the tax form was limited to your name, address, account number, and certain tax reporting amounts. The tax forms did not include social security or tax identification numbers. We have subsequently removed your tax form(s) from our online tax reporting system and have increased the monitoring applied to your account(s).

Please note that our records reflect that the group of linked accounts was only accessed by the customer who alerted us to the error. It is not known whether the individual tax form(s) for the account(s) referenced above were ever specifically accessed by this particular customer.

Although we have no reason to believe the information disclosed on the tax forms will be misused, we at MFS take our clients' privacy very seriously and would like to offer you additional protection through a major credit watch service. Accordingly, MFS has arranged for Equifax to provide credit monitoring services to affected customers free of charge (a social security number is required to access this service). The steps to follow to obtain such credit monitoring services are listed below as Attachment A.

In addition, we advise you to remain vigilant for incidents of fraud and identity theft by reviewing your account statements and monitoring free credit reports provided by each of the nationwide consumer reporting companies:

- Equifax (1-800-685-1111; equifax.com; Equifax Credit Information Services, Inc., P.O. Box 740241, Atlanta, GA 30374);
- Experian (1-888-397-3742; experian.com; Experian, 475 Anton Blvd., Costa Mesa, CA 92626); and
- TransUnion (1-800-916-8800; transunion.com; TransUnion, 2 Baldwin Place, P.O. Box 2000, Chester, PA 19022).

You can also order a free annual credit report online at annualcreditreport.com, by calling 1-877-322-8228, or by completing the Annual Credit Report Request Form available at

www.ftc.gov and mailing it to: Annual Credit Report Request Service, P.O. Box 105281, Atlanta, GA 30348-5281. If you suspect you are a victim of identity theft, we advise you to contact appropriate law enforcement authorities, the Federal Trade Commission (ftc.gov/idtheft, 1-877-438-4338, Identity Theft Clearinghouse, Federal Trade Commission, Washington, DC 20580) and, if applicable, your state's Office of Attorney General.

We sincerely apologize for this error and for any inconvenience this situation may have caused you. This is not indicative of the quality service MFS strives to provide its shareowners. We have since taken the appropriate actions to ensure that such errors are not repeated.

If you have any questions, please call our Client Services Department at 1-800-225-2606 during normal business hours. One of our service representatives will be happy to assist you.

Sincerely,

Cynthia J. Lingley
Vice President

Enclosure(s):

Attachment A

Steps to Obtain Equifax Credit Monitoring Services

1. Enroll in Equifax Credit Watch™ Gold with 3-in-1 Monitoring identity theft protection product. This product is being provided to you at no cost for one year.
2. Additionally, you may choose to adopt an increased level of protection by placing a fraud alert on your credit file at Equifax and the other two credit reporting agencies

Enroll in Equifax Credit Watch™ Gold with 3-in-1 Monitoring

Equifax Credit Watch will provide you with an “early warning system” to changes to your credit file and help you to understand the content of your credit file at the three major credit reporting agencies. The key features and benefits are listed below.

Equifax Credit Watch provides you with the following benefits:

- Comprehensive credit file monitoring and automated alerts of key changes to your Equifax, Experian, and TransUnion credit reports
- Wireless alerts and customizable alerts available
- One 3-in-1 Credit Report and access to your Equifax Credit Report™
- \$1,000,000 in identity theft insurance with \$0 deductible, at no additional cost to you†
- 24 by 7 live agent Customer Service to assist you in understanding the content of your Equifax credit information, to provide personalized identity theft victim assistance and in initiating an investigation of inaccurate information.

How to Enroll

To sign up online for **online delivery** go to www.myservices.equifax.com/tri

1. Consumer Information: complete the form with your contact information (name, address and e-mail address) and click “Continue” button. The information is provided in a secured environment.
2. Identity Verification: complete the form with your Social Security Number, date of birth, telephone #s, create a User Name and Password, agree to the Terms of Use and click “Continue” button. The system will ask you up to two security questions to verify your identity.
3. Payment Information: During the “check out” process, enter the promotion code, provided at the top of your letter, in the “Enter Promotion Code” box. After entering your code press the “Apply Code” button and then the “Submit Order” button at the bottom of the page. (This code eliminates the need to provide a credit card number for payment.)
4. Order Confirmation: – Click “View My Product” to access your 3-in-1 Credit Report and other product features.

To sign up for **US Mail delivery**, dial 1-866-937-8432 for access to the Equifax Credit Watch automated enrollment process. Note that all credit reports and alerts will be sent to you via US Mail only.

1. Promotion Code: You will be asked to enter your promotion code as provided at the top of your letter.
2. Customer Information: You will be asked to enter your home telephone number, home address, name, date of birth and Social Security Number.
3. Permissible Purpose: You will be asked to provide Equifax with your permission to access your credit file and to monitor your file. Without your agreement, Equifax can not process your enrollment.
4. Order Confirmation: Equifax will provide a confirmation number with an explanation that you will receive your Fulfillment Kit via the US Mail (when Equifax is able to verify your identity) or a Customer Care letter with further instructions (if your identity can not be verified using the information provided). Please allow up to 10 business days to receive this information.

Directions for placing a Fraud Alert

A fraud alert is a consumer statement added to your credit report. This statement alerts creditors of possible fraudulent activity within your report as well as requests that they contact you prior to establishing any accounts in your name. Once the fraud alert is added to your credit report, all creditors should contact you prior to establishing any account in your name. To place a fraud alert on your credit file, visit: www.fraudalerts.equifax.com or you may contact our auto fraud line at 1-877-478-7625, and follow the simple prompts. Once the fraud alert has been placed with Equifax, a notification will be sent to the other two credit reporting agencies, Experian and Trans Union, on your behalf.

† Insurance underwritten by member companies of American International Group, Inc. The description herein is a summary only. It does not include all terms, conditions and exclusions of the policies described. Please refer to the actual policies for complete details of coverage and exclusions

This product is not intended for minors (under 18 years of age).