

FACTS WHAT DOES NEWREZ LLC DO WITH YOUR PERSONAL INFORMATION?

Why? Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What? The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- credit history and credit scores
- account balances and payment history

How? All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons **NEWREZ LLC** chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does NEWREZ LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing

- Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or
- Mail the **form** below

Please note:
If you are a *new* customer, we can begin sharing your information 30 days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

Questions? Call toll-free (888) 673-5521 or go to WWW.NEWREZ.COM

Mail-in Form

Mark any/all you want to limit:

- Do not share my personal information with other financial institutions to jointly market to me.
- Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with nonaffiliates to market their products and services to me.

Name	
Address	
City, State, Zip	
Loan #	

Mail to:
NEWREZ LLC
ATTN: COMPLIANCE DEPT
4000 CHEMICAL RD, SUITE
200
PLYMOUTH MEETING, PA
19462

What we do

How does NEWREZ LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does NEWREZ LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Our affiliates include companies with a SHELTER MORTGAGE COMPANY, L.L.C., SHELTER LENDING SERVICES, L.L.C., GUARANTY MORTGAGE SERVICES, LLC, CAPITAL PARTNERS MORTGAGE, LLC, SUMMIT HOME MORTGAGE, LLC, NewRez LLC, CAROLINA ONE MORTGAGE, LLC, PARTNERS UNITED FINANCIAL, LLC, CONWAY FINANCIAL SERVICES, LLC, NEWREZ COMMUNITY LENDING LLC, SHELTER HOME MORTGAGE, LLC, SYNERGY HOME MORTGAGE, LLC, MILESTONE HOME LENDING, LLC, PLUS RELOCATION MORTGAGE, LLC name; and nonfinancial companies, such as AVENUE 365 LENDER SERVICES, LLC, SHELLPOINT INSURANCE, LLC, AND ESTREET APPRAISAL MANAGEMENT COMPANY.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

FOR VERMONT AND CALIFORNIA RESIDENTS ONLY: THE INFORMATION PRACTICES WE HAVE DESCRIBED ABOVE COMPLY WITH FEDERAL LAW. VERMONT AND CALIFORNIA LAWS PLACE ADDITIONAL LIMITS ON SHARING INFORMATION ABOUT THEIR RESIDENTS. IF YOU ARE A VERMONT OR CALIFORNIA RESIDENT, WE WILL AUTOMATICALLY LIMIT THE DISCLOSURE OF YOUR INFORMATION WITHIN AND OUTSIDE OUR FAMILY OF COMPANIES AS PERMITTED OR REQUIRED BY APPLICABLE LAW OR REGULATION.

****NEWREZ LLC OPERATES AS NEWREZ MORTGAGE IN ARKANSAS AND TEXAS**

- BORROWER -

- DATE -

FACTS**WHAT DOES CAPITAL PARTNERS MORTGAGE, LLC DO WITH YOUR PERSONAL INFORMATION?**

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How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons CAPITAL PARTNERS MORTGAGE, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does CAPITAL PARTNERS MORTGAGE, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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<input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.	
<input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me.	
Name	Mail to: CAPITAL PARTNERS MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address	
City, State, Zip	
Loan #	

What we do

How does CAPITAL PARTNERS MORTGAGE, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does CAPITAL PARTNERS MORTGAGE, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

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- BORROWER -

- DATE -

FACTS

WHAT DOES CAROLINA ONE MORTGAGE, LLC DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and income ■ credit history and credit scores ■ account balances and payment history
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons CAROLINA ONE MORTGAGE, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does CAROLINA ONE MORTGAGE, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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Questions?	Call toll-free (888) 673-5521
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Mail-in Form	
<p>Mark any/all you want to limit:</p> <p><input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me.</p> <p><input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes.</p> <p><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</p> <p><input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me.</p>	<p>Mail to: CAROLINA ONE MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462</p>
Name	
Address	
City, State, Zip	
Loan #	

What we do

How does CAROLINA ONE MORTGAGE, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does CAROLINA ONE MORTGAGE, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

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- BORROWER -

- DATE -

FACTS**WHAT DOES CONWAY FINANCIAL SERVICES, LLC DO WITH YOUR PERSONAL INFORMATION?**

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and income ■ credit history and credit scores ■ account balances and payment history
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons CONWAY FINANCIAL SERVICES, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does CONWAY FINANCIAL SERVICES, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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Questions?	Call toll-free (888) 673-5521
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Mail-in Form	
Mark any/all you want to limit: <ul style="list-style-type: none"> <input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me. <input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes. <input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me. <input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me. 	
Name	Mail to: CONWAY FINANCIAL SERVICES, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address	
City, State, Zip	
Loan #	

What we do

How does CONWAY FINANCIAL SERVICES, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does CONWAY FINANCIAL SERVICES, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
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- BORROWER -

- DATE -

FACTS**WHAT DOES GUARANTY MORTGAGE SERVICES, LLC DO WITH YOUR PERSONAL INFORMATION?**

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Reasons we can share your personal information	Does GUARANTY MORTGAGE SERVICES, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
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Name		Mail to: GUARANTY MORTGAGE SERVICES, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address		
City, State, Zip		
Loan #		

What we do

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- BORROWER -

- DATE -

FACTS**WHAT DOES MILESTONE HOME LENDING, LLC DO WITH YOUR PERSONAL INFORMATION?**

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
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Reasons we can share your personal information	Does MILESTONE HOME LENDING, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 –our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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Questions?	Call toll-free (888) 673-5521
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Mail-in Form	
Mark any/all you want to limit: <ul style="list-style-type: none"> <input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me. <input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes. <input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me. <input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me. 	
Name	Mail to: MILESTONE HOME LENDING, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address	
City, State, Zip	
Loan #	

What we do

How does MILESTONE HOME LENDING, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does MILESTONE HOME LENDING, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ■ apply for a loan or give us your income information ■ provide account information or provide employment information ■ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ■ sharing for affiliates' everyday business purposes – information about your creditworthiness ■ affiliates from using your information to market to you ■ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ■ <i>Our affiliates include companies with a SHELTER MORTGAGE COMPANY, L.L.C., SHELTER LENDING SERVICES, L.L.C., GUARANTY MORTGAGE SERVICES, LLC, CAPITAL PARTNERS MORTGAGE, LLC, SUMMIT HOME MORTGAGE, LLC, NEWREZ LLC, CAROLINA ONE MORTGAGE, LLC, PARTNERS UNITED FINANCIAL, LLC, CONWAY FINANCIAL SERVICES, LLC, NEWREZ COMMUNITY LENDING LLC, SHELTER HOME MORTGAGE, LLC, SYNERGY HOME MORTGAGE, LLC, MILESTONE HOME LENDING, LLC, PLUS RELOCATION MORTGAGE, LLC name; and nonfinancial companies, such as AVENUE 365 LENDER SERVICES, LLC, SHELLPOINT INSURANCE, LLC, AND ESTREET APPRAISAL MANAGEMENT COMPANY.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ■ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ■ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

FOR VERMONT AND CALIFORNIA RESIDENTS ONLY: THE INFORMATION PRACTICES WE HAVE DESCRIBED ABOVE COMPLY WITH FEDERAL LAW. VERMONT AND CALIFORNIA LAWS PLACE ADDITIONAL LIMITS ON SHARING INFORMATION ABOUT THEIR RESIDENTS. IF YOU ARE A VERMONT OR CALIFORNIA RESIDENT, WE WILL AUTOMATICALLY LIMIT THE DISCLOSURE OF YOUR INFORMATION WITHIN AND OUTSIDE OUR FAMILY OF COMPANIES AS PERMITTED OR REQUIRED BY APPLICABLE LAW OR REGULATION.

- BORROWER -

- DATE -

FACTS

WHAT DOES NEWREZ COMMUNITY LENDING LLC DO WITH YOUR PERSONAL INFORMATION?

Why? Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What? The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- credit history and credit scores
- account balances and payment history

How? All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons **NEWREZ COMMUNITY LENDING LLC** chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does NEWREZ COMMUNITY LENDING LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing

- Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or
- Mail the **form** below

Please note:
If you are a *new* customer, we can begin sharing your information **30** days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

Questions? Call toll-free **877-728-1071**

Mail-in Form

- Mark any/all you want to limit:
- Do not share my personal information with other financial institutions to jointly market to me.
 - Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
 - Do not allow your affiliates to use my personal information to market to me.
 - Do not share my personal information with nonaffiliates to market their products and services to me.

Name		Mail to: NEWREZ COMMUNITY LENDING LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address		
City, State, Zip		
Loan #		

What we do

How does NEWREZ COMMUNITY LENDING LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does NEWREZ COMMUNITY LENDING LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
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Definitions

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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

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- BORROWER -

- DATE -

FACTS**WHAT DOES PARTNERS UNITED FINANCIAL, LLC DO WITH YOUR PERSONAL INFORMATION?**

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and income ■ credit history and credit scores ■ account balances and payment history
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons PARTNERS UNITED FINANCIAL, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does PARTNERS UNITED FINANCIAL, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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Questions?	Call toll-free (888) 673-5521
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Mail-in Form	
Mark any/all you want to limit: <ul style="list-style-type: none"> <input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me. <input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes. <input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me. <input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me. 	
Name	Mail to: PARTNERS UNITED FINANCIAL, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address	
City, State, Zip	
Loan #	

What we do

How does PARTNERS UNITED FINANCIAL, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does PARTNERS UNITED FINANCIAL, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

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- BORROWER -

- DATE -

FACTS**WHAT DOES PLUS RELOCATION MORTGAGE, LLC DO WITH YOUR PERSONAL INFORMATION?**

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and income ■ credit history and credit scores ■ account balances and payment history
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons PLUS RELOCATION MORTGAGE, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does PLUS RELOCATION MORTGAGE, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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Questions?	Call toll-free (888) 673-5521
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Mail-in Form	
Mark any/all you want to limit: <ul style="list-style-type: none"> <input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me. <input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes. <input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me. <input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me. 	
Name	Mail to: PLUS RELOCATION MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address	
City, State, Zip	
Loan #	

What we do

How does PLUS RELOCATION MORTGAGE, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does PLUS RELOCATION MORTGAGE, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ■ apply for a loan or give us your income information ■ provide account information or provide employment information ■ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ■ sharing for affiliates' everyday business purposes – information about your creditworthiness ■ affiliates from using your information to market to you ■ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
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Definitions

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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ■ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ■ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

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- BORROWER -

- DATE -

FACTS**WHAT DOES SHELTER HOME MORTGAGE, LLC DO WITH YOUR PERSONAL INFORMATION?**

Why? Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What? The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- credit history and credit scores
- account balances and payment history

How? All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons **SHELTER HOME MORTGAGE, LLC** chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does SHELTER HOME MORTGAGE, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing

- Call toll-free (888) 673-5521 –our menu will prompt you through your choice(s) or
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Mail-in Form

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- Do not share my personal information with other financial institutions to jointly market to me.
- Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with nonaffiliates to market their products and services to me.

Name		Mail to: SHELTER HOME MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address		
City, State, Zip		
Loan #		

What we do

How does SHELTER HOME MORTGAGE, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does SHELTER HOME MORTGAGE, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
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- BORROWER -

- DATE -

FACTS

WHAT DOES SHELTER LENDING SERVICES, L.L.C. DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and income ■ credit history and credit scores ■ account balances and payment history
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons SHELTER LENDING SERVICES, L.L.C. chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does SHELTER LENDING SERVICES, L.L.C. share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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Questions?	Call toll-free (888) 673-5521
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Mail-in Form	
<p>Mark any/all you want to limit:</p> <p><input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me.</p> <p><input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes.</p> <p><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</p> <p><input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me.</p>	<p>Mail to: SHELTER LENDING SERVICES, L.L.C. ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462</p>
Name	
Address	
City, State, Zip	
Loan #	

What we do

How does SHELTER LENDING SERVICES, L.L.C. protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does SHELTER LENDING SERVICES, L.L.C. collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Our affiliates include companies with a SHELTER MORTGAGE COMPANY, L.L.C., SHELTER LENDING SERVICES, L.L.C., GUARANTY MORTGAGE SERVICES, LLC, CAPITAL PARTNERS MORTGAGE, LLC, SUMMIT HOME MORTGAGE, LLC, NEWREZ LLC, CAROLINA ONE MORTGAGE, LLC, PARTNERS UNITED FINANCIAL, LLC, CONWAY FINANCIAL SERVICES, LLC, NEWREZ COMMUNITY LENDING LLC, SHELTER HOME MORTGAGE, LLC, SYNERGY HOME MORTGAGE, LLC, MILESTONE HOME LENDING, LLC, PLUS RELOCATION MORTGAGE, LLC name; and nonfinancial companies, such as AVENUE 365 LENDER SERVICES, LLC, SHELLPOINT INSURANCE, LLC, AND ESTREET APPRAISAL MANAGEMENT COMPANY.</i>
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

FOR VERMONT AND CALIFORNIA RESIDENTS ONLY: THE INFORMATION PRACTICES WE HAVE DESCRIBED ABOVE COMPLY WITH FEDERAL LAW. VERMONT AND CALIFORNIA LAWS PLACE ADDITIONAL LIMITS ON SHARING INFORMATION ABOUT THEIR RESIDENTS. IF YOU ARE A VERMONT OR CALIFORNIA RESIDENT, WE WILL AUTOMATICALLY LIMIT THE DISCLOSURE OF YOUR INFORMATION WITHIN AND OUTSIDE OUR FAMILY OF COMPANIES AS PERMITTED OR REQUIRED BY APPLICABLE LAW OR REGULATION.

- BORROWER -

- DATE -

FACTS**WHAT DOES SHELTER MORTGAGE COMPANY, L.L.C. DO WITH YOUR PERSONAL INFORMATION?**

Why? Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What? The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and income
- credit history and credit scores
- account balances and payment history

How? All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons **SHELTER MORTGAGE COMPANY, L.L.C.** chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does SHELTER MORTGAGE COMPANY, L.L.C. share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing

- Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or
- Mail the **form** below

Please note:
If you are a *new* customer, we can begin sharing your information **30** days from the date we sent this notice. When you are *no longer* our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.

Questions? Call toll-free (888) 673-5521

Mail-in Form

Mark any/all you want to limit:

- Do not share my personal information with other financial institutions to jointly market to me.
- Do not share information about my creditworthiness with your affiliates for their everyday business purposes.
- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with nonaffiliates to market their products and services to me.

Name		Mail to: SHELTER MORTGAGE COMPANY, L.L.C. ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address		
City, State, Zip		
Loan #		

What we do

How does SHELTER MORTGAGE COMPANY, L.L.C. protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does SHELTER MORTGAGE COMPANY, L.L.C. collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ■ apply for a loan or give us your income information ■ provide account information or provide employment information ■ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ■ sharing for affiliates' everyday business purposes – information about your creditworthiness ■ affiliates from using your information to market to you ■ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
What happens when I limit sharing for an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ■ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ■ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

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- BORROWER -

- DATE -

FACTS**WHAT DOES SUMMIT HOME MORTGAGE, LLC DO WITH YOUR PERSONAL INFORMATION?**

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: <ul style="list-style-type: none"> ■ Social Security number and income ■ credit history and credit scores ■ account balances and payment history
How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons SUMMIT HOME MORTGAGE, LLC chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does SUMMIT HOME MORTGAGE, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

To limit our sharing	<ul style="list-style-type: none"> ■ Call toll-free (888) 673-5521 –our menu will prompt you through your choice(s) or ■ Mail the form below <p>Please note: If you are a <i>new</i> customer, we can begin sharing your information 30 days from the date we sent this notice. When you are <i>no longer</i> our customer, we continue to share your information as described in this notice. However, you can contact us at any time to limit our sharing.</p>
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Questions?	Call toll-free (888) 673-5521
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Mail-in Form	
Mark any/all you want to limit: <ul style="list-style-type: none"> <input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me. <input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes. <input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me. <input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me. 	
Name	Mail to: SUMMIT HOME MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address	
City, State, Zip	
Loan #	

What we do

How does SUMMIT HOME MORTGAGE, LLC protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.
How does SUMMIT HOME MORTGAGE, LLC collect my personal information?	We collect your personal information, for example, when you <ul style="list-style-type: none"> ▪ apply for a loan or give us your income information ▪ provide account information or provide employment information ▪ show your driver's license We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only <ul style="list-style-type: none"> ▪ sharing for affiliates' everyday business purposes – information about your creditworthiness ▪ affiliates from using your information to market to you ▪ sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
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Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> ▪ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> ▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i>

Other important information

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- BORROWER -

- DATE -

FACTS

WHAT DOES SYNERGY HOME MORTGAGE, LLC DO WITH YOUR PERSONAL INFORMATION?

Why? Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

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Reasons we can share your personal information	Does SYNERGY HOME MORTGAGE, LLC share?	Can you limit this sharing?
For our everyday business purposes - such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	Yes
For our affiliates' everyday business purposes - information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes - information about your creditworthiness	Yes	Yes
For our affiliates to market to you	Yes	Yes
For nonaffiliates to market to you	Yes	Yes

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- Do not allow your affiliates to use my personal information to market to me.
- Do not share my personal information with nonaffiliates to market their products and services to me.

Name		Mail to: SYNERGY HOME MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462
Address		
City, State, Zip		
Loan #		

What we do

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