

**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? |
|--|------------------------|-----------------------------|
| <b>For our everyday business purposes -</b><br>such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | <b>Yes</b>             | <b>No</b>                   |
| <b>For our marketing purposes -</b><br>to offer our products and services to you   | <b>Yes</b>             | <b>No</b>                   |
| <b>For joint marketing with other financial companies</b>  | <b>Yes</b>             | <b>Yes</b>                  |
| <b>For our affiliates' everyday business purposes -</b><br>information about your transactions and experiences   | <b>Yes</b>             | <b>No</b>                   |
| <b>For our affiliates' everyday business purposes -</b><br>information about your creditworthiness   | <b>Yes</b>             | <b>Yes</b>                  |
| <b>For our affiliates to market to you</b>   | <b>Yes</b>             | <b>Yes</b>                  |
| <b>For nonaffiliates to market to you</b>  | <b>Yes</b>             | <b>Yes</b>                  |

**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](http://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

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

## Definitions

|                        |  |
|------------------------|--|
| <b>Affiliates</b>      | Companies related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>▪ <i>Our affiliates include companies with a SHELTER MORTGAGE COMPANY, L.L.C., SHELTER LENDING SERVICES, L.L.C., PREFERRED LENDING SERVICES, LLC, 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></li> </ul> |
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| <b>Joint marketing</b> | A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i></li> </ul>   |

## 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 NEWREZ COMMUNITY LENDING LLC DO WITH YOUR PERSONAL INFORMATION?**

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

**To limit our sharing**

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

**Mail-in Form**

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- 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             |  | <b>Mail to:</b><br><b>NEWREZ COMMUNITY LENDING LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |   |
| City, State, Zip |  |   |
| Loan #           |  |   |

## What we do

|   |   |
|---|---|
| <b>How does NEWREZ COMMUNITY LENDING LLC protect my personal information?</b>             | 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.   |
| <b>How does NEWREZ COMMUNITY LENDING LLC collect my personal information?</b>             | We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>■ apply for a loan or give us your income information</li> <li>■ provide account information or provide employment information</li> <li>■ show your driver's license</li> </ul> We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.   |
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| <b>Nonaffiliates</b>   | Companies not related by common ownership or control. They can be financial and nonfinancial companies. <ul style="list-style-type: none"> <li>■ <i>Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.</i></li> </ul>  |
| <b>Joint marketing</b> | A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>■ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i></li> </ul>   |

## Other important information

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- BORROWER -

- DATE -

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

|              |  |
|--------------|--|
| <b>Why?</b>  | 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.                 |
| <b>What?</b> | 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"> <li>■ Social Security number and income</li> <li>■ credit history and credit scores</li> <li>■ account balances and payment history</li> </ul>        |
| <b>How?</b>  | 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 <b>CAPITAL PARTNERS MORTGAGE, LLC</b> chooses to share; and whether you can limit this sharing. |

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

|                             |   |
|-----------------------------|---|
| <b>To limit our sharing</b> | <ul style="list-style-type: none"> <li>■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or</li> <li>■ Mail the <b>form</b> below</li> </ul> <p><b>Please note:</b><br/>If you are a <i>new</i> customer, we can begin sharing your information <b>30</b> 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> |
|-----------------------------|---|

|                   |                               |
|-------------------|-------------------------------|
| <b>Questions?</b> | Call toll-free (888) 673-5521 |
|-------------------|-------------------------------|

| Mail-in Form   |   |
|--|---|
| Mark any/all you want to limit: <ul style="list-style-type: none"> <li><input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me.</li> <li><input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes.</li> <li><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</li> <li><input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me.</li> </ul> |   |
| Name   | <b>Mail to:</b><br><b>CAPITAL PARTNERS MORTGAGE, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address  |   |
| City, State, Zip   |   |
| Loan #   |   |

## What we do

|   |   |
|---|---|
| <b>How does CAPITAL PARTNERS MORTGAGE, LLC protect my personal information?</b>           | 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.   |
| <b>How does CAPITAL PARTNERS MORTGAGE, LLC collect my personal information?</b>           | <p>We collect your personal information, for example, when you</p> <ul style="list-style-type: none"> <li>■ apply for a loan or give us your income information</li> <li>■ provide account information or provide employment information</li> <li>■ show your driver's license</li> </ul> <p>We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.</p>   |
| <b>Why can't I limit all sharing?</b>   | <p>Federal law gives you the right to limit only</p> <ul style="list-style-type: none"> <li>■ sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>■ affiliates from using your information to market to you</li> <li>■ sharing for nonaffiliates to market to you</li> </ul> <p>State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.</p> |
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## Definitions

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| <b>Joint marketing</b> | <p>A formal agreement between nonaffiliated financial companies that together market financial products or services to you.</p> <ul style="list-style-type: none"> <li>■ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i></li> </ul>   |

## Other important information

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- BORROWER -

- DATE -

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

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- 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? |
|--|--|-----------------------------|
| <b>For our everyday business purposes -</b><br>such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | <b>Yes</b>                             | <b>No</b>                   |
| <b>For our marketing purposes -</b><br>to offer our products and services to you   | <b>Yes</b>                             | <b>No</b>                   |
| <b>For joint marketing with other financial companies</b>  | <b>Yes</b>                             | <b>Yes</b>                  |
| <b>For our affiliates' everyday business purposes -</b><br>information about your transactions and experiences   | <b>Yes</b>                             | <b>No</b>                   |
| <b>For our affiliates' everyday business purposes -</b><br>information about your creditworthiness   | <b>Yes</b>                             | <b>Yes</b>                  |
| <b>For our affiliates to market to you</b>   | <b>Yes</b>                             | <b>Yes</b>                  |
| <b>For nonaffiliates to market to you</b>  | <b>Yes</b>                             | <b>Yes</b>                  |

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|                  |  |   |
|------------------|--|---|
| Name             |  | <b>Mail to:</b><br><b>CAROLINA ONE MORTGAGE, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |   |
| City, State, Zip |  |   |
| Loan #           |  |   |
|                  |  |   |

## What we do

|   |   |
|---|---|
| <b>How does CAROLINA ONE MORTGAGE, LLC protect my personal information?</b>               | 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.   |
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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:

- 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? |
|---|--|-----------------------------|
| <b>For our everyday business purposes -</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | <b>Yes</b>                                 | <b>No</b>                   |
| <b>For our marketing purposes -</b> to offer our products and services to you   | <b>Yes</b>                                 | <b>No</b>                   |
| <b>For joint marketing with other financial companies</b>   | <b>Yes</b>                                 | <b>Yes</b>                  |
| <b>For our affiliates' everyday business purposes -</b> information about your transactions and experiences   | <b>Yes</b>                                 | <b>No</b>                   |
| <b>For our affiliates' everyday business purposes -</b> information about your creditworthiness   | <b>Yes</b>                                 | <b>Yes</b>                  |
| <b>For our affiliates to market to you</b>  | <b>Yes</b>                                 | <b>Yes</b>                  |
| <b>For nonaffiliates to market to you</b>   | <b>Yes</b>                                 | <b>Yes</b>                  |

**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             |  | <b>Mail to:</b><br><b>CONWAY FINANCIAL SERVICES, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |   |
| City, State, Zip |  |   |
| Loan #           |  |   |

## What we do

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

## Definitions

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

## 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 GUARANTY MORTGAGE 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.

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

**To limit our sharing**

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

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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             | <b>Mail to:</b><br><b>GUARANTY MORTGAGE SERVICES, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |
| City, State, Zip |  |
| Loan #           |  |

## What we do

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

## Other important information

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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.

**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 **MILESTONE HOME LENDING, LLC** chooses to share; and whether you can limit this sharing.

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

**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             |  | <b>Mail to:</b><br><b>MILESTONE HOME LENDING, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |  |
| City, State, Zip |  |  |
| Loan #           |  |  |
|                  |  |  |

## What we do

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

## Definitions

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

## 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.

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

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|                  |  |   |
|------------------|--|---|
| Name             |  | <b>Mail to:</b><br><b>PARTNERS UNITED FINANCIAL, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |   |
| City, State, Zip |  |   |
| Loan #           |  |   |
|                  |  |   |

## What we do

|   |   |
|---|---|
| <b>How does PARTNERS UNITED FINANCIAL, LLC protect my personal information?</b>           | 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.   |
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- BORROWER -

- DATE -



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

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

**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             |  | <b>Mail to:</b><br><b>PLUS RELOCATION MORTGAGE, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |  |
| City, State, Zip |  |  |
| Loan #           |  |  |

## What we do

|   |   |
|---|---|
| <b>How does PLUS RELOCATION MORTGAGE, LLC protect my personal information?</b>            | 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.   |
| <b>How does PLUS RELOCATION MORTGAGE, LLC collect my personal information?</b>            | We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>■ apply for a loan or give us your income information</li> <li>■ provide account information or provide employment information</li> <li>■ show your driver's license</li> </ul> We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.   |
| <b>Why can't I limit all sharing?</b>   | Federal law gives you the right to limit only <ul style="list-style-type: none"> <li>■ sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>■ affiliates from using your information to market to you</li> <li>■ sharing for nonaffiliates to market to you</li> </ul> State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law. |
| <b>What happens when I limit sharing for an account I hold jointly with someone else?</b> | Your choices will apply to everyone on your account.  |

## Definitions

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

## Other important information

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- BORROWER -

- DATE -

**FACTS****WHAT DOES PREFERRED LENDING SERVICES, LLC DO WITH YOUR PERSONAL INFORMATION?**

|              |   |
|--------------|---|
| <b>Why?</b>  | 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.                  |
| <b>What?</b> | 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"> <li>■ Social Security number and income</li> <li>■ credit history and credit scores</li> <li>■ account balances and payment history</li> </ul>         |
| <b>How?</b>  | 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 <b>PREFERRED LENDING SERVICES, LLC</b> chooses to share; and whether you can limit this sharing. |

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

|                             |   |
|-----------------------------|---|
| <b>To limit our sharing</b> | <ul style="list-style-type: none"> <li>■ Call toll-free (888) 673-5521 –our menu will prompt you through your choice(s) or</li> <li>■ Mail the form below</li> </ul> <p><b>Please note:</b><br/>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> |
|-----------------------------|---|

|                   |                               |
|-------------------|-------------------------------|
| <b>Questions?</b> | Call toll-free (888) 673-5521 |
|-------------------|-------------------------------|

| Mail-in Form   |  |
|--|--|
| Mark any/all you want to limit: <ul style="list-style-type: none"> <li><input type="checkbox"/> Do not share my personal information with other financial institutions to jointly market to me.</li> <li><input type="checkbox"/> Do not share information about my creditworthiness with your affiliates for their everyday business purposes.</li> <li><input type="checkbox"/> Do not allow your affiliates to use my personal information to market to me.</li> <li><input type="checkbox"/> Do not share my personal information with nonaffiliates to market their products and services to me.</li> </ul> |  |
| Name   | <b>Mail to:</b><br><b>PREFERRED LENDING SERVICES, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address  |  |
| City, State, Zip   |  |
| Loan #   |  |

## What we do

|   |   |
|---|---|
| <b>How does PREFERRED LENDING SERVICES, LLC protect my personal information?</b>          | 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.   |
| <b>How does PREFERRED LENDING SERVICES, LLC collect my personal information?</b>          | We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>■ apply for a loan or give us your income information</li> <li>■ provide account information or provide employment information</li> <li>■ show your driver's license</li> </ul> We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.   |
| <b>Why can't I limit all sharing?</b>   | Federal law gives you the right to limit only <ul style="list-style-type: none"> <li>■ sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>■ affiliates from using your information to market to you</li> <li>■ sharing for nonaffiliates to market to you</li> </ul> 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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| <b>Joint marketing</b> | A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>■ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i></li> </ul>   |

## 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? |
|---|--|-----------------------------|
| <b>For our everyday business purposes -</b> such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus | <b>Yes</b>                             | <b>No</b>                   |
| <b>For our marketing purposes -</b> to offer our products and services to you   | <b>Yes</b>                             | <b>No</b>                   |
| <b>For joint marketing with other financial companies</b>   | <b>Yes</b>                             | <b>Yes</b>                  |
| <b>For our affiliates' everyday business purposes -</b> information about your transactions and experiences   | <b>Yes</b>                             | <b>No</b>                   |
| <b>For our affiliates' everyday business purposes -</b> information about your creditworthiness   | <b>Yes</b>                             | <b>Yes</b>                  |
| <b>For our affiliates to market to you</b>  | <b>Yes</b>                             | <b>Yes</b>                  |
| <b>For nonaffiliates to market to you</b>   | <b>Yes</b>                             | <b>Yes</b>                  |

**To limit our sharing**

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

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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             |  | <b>Mail to:</b><br><b>SHELTER HOME MORTGAGE, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |   |
| City, State, Zip |  |   |
| Loan #           |  |   |

## What we do

|   |   |
|---|---|
| <b>How does SHELTER HOME MORTGAGE, LLC protect my personal information?</b>               | 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.   |
| <b>How does SHELTER HOME MORTGAGE, LLC collect my personal information?</b>               | We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>▪ apply for a loan or give us your income information</li> <li>▪ provide account information or provide employment information</li> <li>▪ show your driver's license</li> </ul> We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.   |
| <b>Why can't I limit all sharing?</b>   | Federal law gives you the right to limit only <ul style="list-style-type: none"> <li>▪ sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>▪ affiliates from using your information to market to you</li> <li>▪ sharing for nonaffiliates to market to you</li> </ul> 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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## Other important information

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- BORROWER -

- DATE -

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

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

**Mail to:**  
**SHELTER LENDING SERVICES, L.L.C.**  
**ATTN: COMPLIANCE DEPT**  
**4000 CHEMICAL RD, SUITE 200**  
**PLYMOUTH MEETING, PA 19462**

## What we do

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

|                             |   |
|-----------------------------|---|
| <b>To limit our sharing</b> | <ul style="list-style-type: none"> <li>■ Call toll-free (888) 673-5521 -our menu will prompt you through your choice(s) or</li> <li>■ Mail the form below</li> </ul> <p><b>Please note:</b><br/>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> |
|-----------------------------|---|

|                   |                               |
|-------------------|-------------------------------|
| <b>Questions?</b> | Call toll-free (888) 673-5521 |
|-------------------|-------------------------------|

| Mail-in Form   |   |
|--|---|
| Mark any/all you want to limit:  |   |
| <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   | <b>Mail to:</b><br><b>SHELTER MORTGAGE COMPANY, L.L.C.</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address  |   |
| City, State, Zip   |   |
| Loan #   |   |

## What we do

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

## Definitions

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

## 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 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:

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

**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             |  | <b>Mail to:</b><br><b>SUMMIT HOME MORTGAGE, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |  |
| City, State, Zip |  |  |
| Loan #           |  |  |
|                  |  |  |

## What we do

|   |   |
|---|---|
| <b>How does SUMMIT HOME MORTGAGE, LLC protect my personal information?</b>                | 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.   |
| <b>How does SUMMIT HOME MORTGAGE, LLC collect my personal information?</b>                | We collect your personal information, for example, when you <ul style="list-style-type: none"> <li>▪ apply for a loan or give us your income information</li> <li>▪ provide account information or provide employment information</li> <li>▪ show your driver's license</li> </ul> We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.   |
| <b>Why can't I limit all sharing?</b>   | Federal law gives you the right to limit only <ul style="list-style-type: none"> <li>▪ sharing for affiliates' everyday business purposes – information about your creditworthiness</li> <li>▪ affiliates from using your information to market to you</li> <li>▪ sharing for nonaffiliates to market to you</li> </ul> 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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| <b>Joint marketing</b> | A formal agreement between nonaffiliated financial companies that together market financial products or services to you. <ul style="list-style-type: none"> <li>▪ <i>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</i></li> </ul>   |

## Other important information

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- BORROWER -

- DATE -

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

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- 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 **SYNERGY HOME MORTGAGE, LLC** chooses to share; and whether you can limit this sharing.

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

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

|                  |  |   |
|------------------|--|---|
| Name             |  | <b>Mail to:</b><br><b>SYNERGY HOME MORTGAGE, LLC</b><br><b>ATTN: COMPLIANCE DEPT</b><br><b>4000 CHEMICAL RD, SUITE 200</b><br><b>PLYMOUTH MEETING, PA 19462</b> |
| Address          |  |   |
| City, State, Zip |  |   |
| Loan #           |  |   |
|                  |  |   |

## What we do

|   |   |
|---|---|
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