Rev. 01/19

FACTS WHAT DOES NEWREZ LLC DO WITH YOUR PERSON
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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

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

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Mail-in Form			
	☐ Do not share ☐ Do not allow	want to limit: my personal information with other financial institutions to jointly ma information about my creditworthiness with your affiliates for their ev your affiliates to use my personal information to market to me. my personal information with nonaffiliates to market their products ar	veryday business purposes.
	Name Address City, State, Zip Loan #		Mail to: NEWREZ LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

### Page 2 What we do How does NEWREZ LLC protect my personal To protect your personal information from unauthorized access and use, we use information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does NEWREZ LLC collect my personal We collect your personal information, for example, when you information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
	■ 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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
	■ Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
	Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.

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

## 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.

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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 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

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Mail-in Form			
	☐ Do not share i☐ Do not allow	want to limit: my personal information with other financial institutions to jointly mainformation about my creditworthiness with your affiliates for their e your affiliates to use my personal information to market to me. my personal information with nonaffiliates to market their products a	veryday business purposes.
	Name Address City, State, Zip Loan #		Mail to: SHELTER MORTGAGE COMPANY, L.L.C. ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2

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?	<ul> <li>We collect your personal information, for example, when you</li> <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> <li>We also collect your personal information from others, such as credit bureaus, affiliates, or other companies.</li> </ul>	
Why can't I limit all sharing?	Federal law gives you the right to limit only  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.
	Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
	<ul> <li>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</li> </ul>

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- BORROWER -

- DATE -

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

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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?

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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 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

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However, you can contact us at any time to limit our sharing.

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Mail-in Form			
	☐ Do not share ☐ Do not allow	want to limit: my personal information with other financial institutions to jointly ma information about my creditworthiness with your affiliates for their e- your affiliates to use my personal information to market to me. my personal information with nonaffiliates to market their products a	veryday business purposes.
	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

#### Page 2

What we do	security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.  We collect your personal information, for example, when you  apply for a loan or give us your income information  provide account information or provide employment information show your driver's license			
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?	<ul> <li>apply for a loan or give us your income information</li> <li>provide account information or provide employment information</li> </ul>			
Why can't I limit all sharing?	Federal law gives you the right to limit only			
	<ul> <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> <li>State laws and individual companies may give you additional rights to limit sharing.</li> <li>See below for more on your rights under state law.</li> </ul>			
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				

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
	■ 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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
	Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

#### Other important information

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REFERRAL SERVICES.

Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE

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

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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 GUARANTY MORTGAGE SERVICES, LLC chooses to share; and whether you can limit this sharing.

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
For nonaffiliates to market to you	Yes	Yes

## To limit our sharing

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Mail-in Form			
	☐ Do not share ☐ Do not allow	want to limit: my personal information with other financial institutions to jointly ma information about my creditworthiness with your affiliates for their ex your affiliates to use my personal information to market to me. my personal information with nonaffiliates to market their products ar	veryday business purposes.
	Name Address City, State, Zip Loan #		Mail to: GUARANTY MORTGAGE SERVICES, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does GUARANTY MORTGAGE SERVICES, To protect your personal information from unauthorized access and use, we use LLC protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does GUARANTY MORTGAGE SERVICES, We collect your personal information, for example, when you **LLC** collect my personal information? 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 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.

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.  Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
	<ul> <li>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</li> </ul>

### Other important information

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- BORROWER - - DATE -

What happens when I limit sharing for an account I

hold jointly with someone else?

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

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## What?

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- credit history and credit scores
- account balances and payment history

#### How?

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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	ur affiliates to market to you Yes	
For nonaffiliates to market to you	Yes	Yes

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## **Questions?**

Mail-in Form		
	Mark any/all you want to limit:  ☐ Do not share my personal information with other financial institutions to jointly m ☐ Do not share information about my creditworthiness with your affiliates for their e ☐ 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 a	veryday business purposes.
	Name Address City, State, Zip Loan #	Mail to: CAROLINA ONE MORGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does CAROLINA ONE MORTGAGE, LLC To protect your personal information from unauthorized access and use, we use protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does CAROLINA ONE MORTGAGE, LLC We collect your personal information, for example, when you collect my personal information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

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

N/II	
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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?

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- credit history and credit scores
- account balances and payment history

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

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Mail-in Form			
	☐ Do not share in☐ Do not allow y	rant to limit:  ny personal information with other financial institutions to jointly manformation about my creditworthiness with your affiliates for their expour affiliates to use my personal information to market to me.  ny personal information with nonaffiliates to market their products and	veryday business purposes.
	Name Address City, State, Zip Loan #		Mail to: SUMMIT HOME MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does SUMMIT HOME MORTGAGE, LLC To protect your personal information from unauthorized access and use, we use protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does SUMMIT HOME MORTGAGE, LLC We collect your personal information, for example, when you collect my personal information? 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

- 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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Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.  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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.  Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.  Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.

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.

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- DATE -

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

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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 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

- 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.

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Mail-in Form		
	Mark any/all you want to limit:  ☐ Do not share my personal information with other financial institutions to ☐ Do not share information about my creditworthiness with your affiliates f ☐ Do not allow your affiliates to use my personal information to market to ☐ Do not share my personal information with nonaffiliates to market their p	or their everyday business purposes.
	Name Address City, State, Zip Loan #	Mail to: CAPITAL PARTNERS MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does CAPITAL PARTNERS MORTGAGE, To protect your personal information from unauthorized access and use, we use LLC protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does CAPITAL PARTNERS MORTGAGE, We collect your personal information, for example, when you **LLC** collect my personal information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
	■ 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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
	■ Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
	Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.

### 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.

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

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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?
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.

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	Mark any/all you want to limit:  ☐ Do not share my personal information with other financial institutions to jointly ma ☐ Do not share information about my creditworthiness with your affiliates for their ex ☐ 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 an	veryday business purposes.
	Name Address  City, State, Zip Loan #	Mail to: CONWAY FINANCIAL SERVICES, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does CONWAY FINANCIAL SERVICES, To protect your personal information from unauthorized access and use, we use LLC protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does CONWAY FINANCIAL SERVICES, We collect your personal information, for example, when you **LLC** collect my personal information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.  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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.  Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.  • Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.

#### 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.

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

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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

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

- 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.

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	☐ Do not share ☐ Do not allow	want to limit: my personal information with other financial institutions to jointly ma information about my creditworthiness with your affiliates for their ex your affiliates to use my personal information to market to me. my personal information with nonaffiliates to market their products an	veryday business purposes.
	Name Address City, State, Zip Loan #		Mail to: PARTNERS UNITED FINANCIAL, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does PARTNERS UNITED FINANCIAL, To protect your personal information from unauthorized access and use, we use LLC protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does PARTNERS UNITED FINANCIAL, We collect your personal information, for example, when you **LLC** collect my personal information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
	■ 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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
	■ Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
	<ul> <li>Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.</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.

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

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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

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.

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

#### Page 2 What we do How does newrez community lending LLC To protect your personal information from unauthorized access and use, we use protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does newrez community lending LLC We collect your personal information, for example, when you collect my personal information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.  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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.  Nonaffiliates we share with can include FINANCIAL SERVICES COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES, DIRECT MARKETING COMPANIES, AND NON-PROFIT ORGANIZATIONS.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.  • Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.

### Other important information

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

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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

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- Mail the **form** below

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**Questions?** 

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Mail-in Form		
	Mark any/all you want to limit:  ☐ Do not share my personal information with other financial institutions to jointly m ☐ Do not share information about my creditworthiness with your affiliates for their of ☐ 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 the share my personal information with nonaffiliates to market their products and the share my personal information with nonaffiliates.	everyday business purposes.
	Name Address City, State, Zip Loan #	Mail to: SHELTER HOME MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does shelter home mortgage, LLC To protect your personal information from unauthorized access and use, we use protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does SHELTER HOME MORTGAGE, LLC We collect your personal information, for example, when you collect my personal information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

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Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.  • Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.

### 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.

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

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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 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?
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.

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Mail-in Form			
	☐ Do not share ☐ Do not allow	want to limit: my personal information with other financial institutions to jointly mainformation about my creditworthiness with your affiliates for their expour affiliates to use my personal information to market to me. my personal information with nonaffiliates to market their products an	veryday business purposes.
	Name Address City, State, Zip Loan #		Mail to: SYNERGY HOME MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does SYNERGY HOME MORTGAGE, LLC To protect your personal information from unauthorized access and use, we use protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does SYNERGY HOME MORTGAGE, LLC We collect your personal information, for example, when you collect my personal information? 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 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 Your choices will apply to everyone on your account. hold jointly with someone else?

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies.
	■ 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.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies.
	<ul> <li>Nonaffiliates we share with can include FINANCIAL SERVICES         COMPANIES, MORTGAGE COMPANIES, INSURANCE COMPANIES,         DIRECT MARKETING COMPANIES, AND NON-PROFIT         ORGANIZATIONS.</li> </ul>
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
	Our joint marketing partners include MORTGAGE LENDERS, HOME WARRANTY COMPANIES, PAYMENT ACCELERATOR SERVICE COMPANIES, INSURANCE COMPANIES, AND MAINTENANCE REFERRAL SERVICES.

### Other important information

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

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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?	
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

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However, you can contact us at any time to limit our sharing.

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Mail-in Form		
	Mark any/all you want to limit:  ☐ Do not share my personal information with other financial institut ☐ Do not share information about my creditworthiness with your aff ☐ Do not allow your affiliates to use my personal information to ma ☐ Do not share my personal information with nonaffiliates to marke	iliates for their everyday business purposes.
	Name Address City, State, Zip Loan #	Mail to: MILESTONE HOME LENDING, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462

#### Page 2 What we do How does MILESTONE HOME LENDING, LLC To protect your personal information from unauthorized access and use, we use protect my personal information? security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. How does MILESTONE HOME LENDING, LLC We collect your personal information, for example, when you collect my personal information? 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 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 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.
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Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you.
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### Other important information

hold jointly with someone else?

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## 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?
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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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: PLUS RELOCATION MORTGAGE, LLC ATTN: COMPLIANCE DEPT 4000 CHEMICAL RD, SUITE 200 PLYMOUTH MEETING, PA 19462	

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