

YOUR CHOICE TO LIMIT MARKETING

- ABC Financial Institution, DEF Insurance, GHI Securities and JKL Mortgage are providing this notice.
- Federal law gives you the right to limit some but not all marketing from our “affiliates,” which in this notice means the following companies: ABC Financial Institution, DEF Insurance, GHI Securities and JKL Mortgage. Federal law also requires us to give you this notice to tell you about your choice to limit marketing from our affiliates.
- You may limit our affiliates from marketing their products or services to you based on your personal information that they receive from us or other affiliates. This information includes your income, your account history with us, your credit score, your payment history, and your credit history.
- Your choice to limit marketing offers from our affiliates will apply for at least 5 years from when you tell us your choice. Once that period expires, you will receive a renewal notice that will allow you to continue to limit marketing offers from our affiliates for at least another 5 years.
- If you have already made a choice to limit marketing offers from our affiliates, you do not need to do so again.
- If you have obtained a product or service jointly with another person or persons, you will be given the opportunity to limit marketing just to yourself, or you may limit marketing to all parties to the account.
- You may exercise your right to limit marketing offers at any time.



If I have an account with another person or persons, to whom does the choice apply?



You will be able to indicate if the information should be limited for everyone on the account. Some institutions will also give you the option of choosing for yourself and letting the other person(s) make their own choice.

How do I indicate a decision to limit marketing information?

Review the attached notice for information on how to indicate your choice.

Affiliate Marketing



Important Affiliate Marketing Notice Attached

CUSTOMER IMPRINT HERE



What is affiliate marketing?

Affiliate marketing allows your financial institution to partner with related businesses (affiliates) that consider your specific qualities to suggest products and services that might benefit you.

What is an affiliate marketing notice?

The attached notice informs you of your choice to receive or limit information about other products, services, or special offers from your financial institution's affiliates.

Is this different from other notices that I get about my information?

Yes. This doesn't directly affect how information is shared but how it is used.

Why is this notice being given?

It is required by the Fair and Accurate Credit Transactions Act (FACT Act) of 2003 and by recently issued regulations.

What does the notice cover?

It includes the name(s) of the organization(s) giving the notice, the name(s) of the organization(s) that might use your information, the type of information involved, and how to make your choice.

What if I choose to limit marketing?

You will not receive marketing information from your financial institution's affiliates for at least five years unless you change your preference before then.

Are there exceptions to this?

Yes. If you are already an existing customer of an affiliate, your choice won't affect your relationship with them.

Is there a time limit?

Some institutions will place a time limit of at least five years. Other institutions won't have a time limit and the choice is effective indefinitely. If your notice specifies a time limit and you have chosen not to receive marketing information, you might receive a renewal notice requesting your choice again when the time limit expires.

To limit marketing offers, contact us:

- **By mail:** Check the box and complete the form below, and send the form to:

ABC Financial Institution
101 Your Street
Your City, USA 10101

- Do not allow any of your affiliates to use my personal information to market to me.
- Do not allow any of your affiliates to use personal information to market to me or anyone else on this account.

Signature

Name(s)

Street Address

Apt#

City, State, ZIP

Account Number(s)

Review the attached educational brochure to learn more about affiliate marketing and the effects of your choice.

