

# FACTS

## WHAT DOES KELLIBROOKE MORTGAGE PARTNERS, 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
- Account balances and payment history
- Credit history and credit scores

When you are *no longer* our customer, we continue to share your information as described in this notice.

### 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 Kellibrooke Mortgage Partners, LLC chooses to share; and whether you can limit this sharing.

| Reasons we can share your personal information   | Does Kellibrooke Mortgage Partners, 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   | No   | We don't share              |
| <b>For joint marketing with other financial companies</b>  | No   | We don't share              |
| <b>For our affiliates' everyday business purposes—</b> information about your transactions and experiences   | No   | We don't share              |
| <b>For our affiliates' everyday business purposes—</b> information about your creditworthiness   | No   | We don't share              |
| <b>For our affiliates to market to you</b>   | No   | We don't share              |
| <b>For nonaffiliates to market to you</b>  | No   | We don't share              |

### Questions?

Call (512) 350-9124 or email [case@kellibrooke.com](mailto:case@kellibrooke.com)

| Who we are   |   |
|--|---|
| <b>Who is providing this notice?</b>   | Kellibrooke Mortgage Partners, LLC (NMLS ID #2022197), a licensed Texas mortgage broker located at 4201 Sun Spirit Drive, Austin, TX 78735.   |
| What we do   |   |
| <b>How does Kellibrooke Mortgage Partners, 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. We also restrict access to your personal information to employees who need it to provide products or services to you.   |
| <b>How does Kellibrooke Mortgage Partners, 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 employment history</li> <li>• give us your income information or provide account information</li> <li>• provide your contact information</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.</p>                  |
| Definitions  |   |
| <b>Affiliates</b>  | <p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• <i>Kellibrooke Mortgage Partners, LLC has no affiliates.</i></li> </ul>   |
| <b>Nonaffiliates</b>   | <p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>• <i>Kellibrooke Mortgage Partners, LLC does not share customer information with nonaffiliates so they can market to you. We do share your information with the wholesale lender to which we submit your loan application, as necessary to process your transaction.</i></li> </ul> |
| <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>Kellibrooke Mortgage Partners, LLC does not jointly market.</i></li> </ul>  |
| Other important information  |   |
| <p><b>For Texas residents:</b> Complaints regarding Kellibrooke Mortgage Partners, LLC may be filed with the Texas Department of Savings and Mortgage Lending, 2601 N. Lamar Blvd., Suite 201, Austin, TX 78705. Toll-free: (877) 276-5550. Website: <a href="http://www.sml.texas.gov">www.sml.texas.gov</a>.</p> |   |