

**FOR CALIFORNIA CUSTOMERS ONLY**  
**IMPORTANT PRIVACY CHOICES FOR CONSUMERS**

**You have the right to control whether we share some of your personal information.**

**Please read the following information carefully before you make your choices below.**

**Your Rights**

You have the following rights to restrict the sharing of personal and financial information with our affiliates (companies we own or control) and outside companies that we do business with. Nothing in this form prohibits the sharing of information necessary for us to follow the law, as permitted by law, or to give you the best service on your account with us. This includes sending you information about other products or services.

**Your Choices**

**Restrict Information Sharing With Companies We Own Or Control (Affiliates):** Unless you say "No", we may share personal and financial information about you with our affiliated companies.

No, please do not share personal and financial information with your affiliated companies.

**Restrict Information Sharing With Other Companies We Do Business With To Provide Financial Products and Services:** Unless you say "No," we may share personal and financial information about you with outside companies we contract with to provide financial products and services to you.

No, please do not share personal and financial information with outside companies you contract with to provide financial products and services.

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**Time Sensitive Reply**

You may make your privacy choice(s) at any time. Your choice(s) marked here will remain unless you state otherwise. However, if we do not hear from you, we may share some of your information with affiliated companies and companies with whom we have contracts to provide products and services.

Name: \_\_\_\_\_ Account Number: \_\_\_\_\_

Signature: \_\_\_\_\_

To exercise your choices, please do one (1) of the following:

- (1) Fill out, sign and send back this form to us (you may want to make a copy for your records);
- (2) Call this toll-free number 888-799-0856.

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## CONSENT ACKNOWLEDGMENT

Simple Path Financial will not, except as discussed below, disclose nonpublic personal information about you to nonaffiliated third parties unless you authorize us to make that disclosure. This Consent Acknowledgment applies only to individuals who have accounts with Simple Path Financial for personal, family, or household purposes. Nothing in this form prohibits the sharing of information necessary for us to follow the law, as otherwise permitted by law, as otherwise provided for in the enclosed forms entitled "WHAT DOES SIMPLE PATH FINANCIAL DO WITH YOUR PERSONAL INFORMATION?" and "Important Privacy Choices for Consumers", or to give you the best service on your accounts with us. This includes sending you information about other products or services.

By completing this Consent Acknowledgment and returning it to Simple Path Financial, you are consenting to Simple Path Financial's disclosure of your nonpublic personal information to nonaffiliated third parties. You may tear off, complete and sign the attached form and return to the following address:

Simple Path Financial  
16842 Von Karman Avenue, Suite 200  
Irvine, CA 92606

Simple Path Financial will retain a true and correct copy of this consent. You are entitled to a copy of the returned document upon your request. You may wish to make a copy for your records.

If you have a joint account with one or more additional persons, a decision to consent to sharing must be signed by all account holders. If you have multiple accounts with us, you must designate the accounts, if any, to which your consent will apply. You have a separate right to consent to our sharing with respect to each of your accounts. Your consent made with respect to one of your accounts will not be treated as consent with respect to all of your accounts.

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**Yes. I wish to exercise my right to "opt-in" and authorize Simple Path Financial to disclose my nonpublic personal information to nonaffiliated third parties. I understand that unless I sign below and send in my authorization, Simple Path Financial may not disclose my nonpublic personal information to nonaffiliated third parties and except as otherwise permitted by law or as provided for in the enclosed forms entitled "WHAT DOES SIMPLE PATH FINANCIAL DO WITH YOUR PERSONAL INFORMATION?" and "Important Privacy Choices for Consumers."**

**I understand that my consent will remain in effect until revoked or modified by me. I may revoke my consent at any time by writing Simple Path Financial at the address above. My written revocation will include my name, contact information, account number(s) and will state that I wish to revoke my consent acknowledgment. If I have a joint account with one or more persons, a decision to revoke our prior consent by one of us will be treated as a revocation for all of us with respect to that account.**

**Account Number(s):** \_\_\_\_\_

**Account Holder's Signature and Co-Account Holder's Signature (if applicable):**

**(x)** \_\_\_\_\_

**(x)** \_\_\_\_\_

**Print Name:** \_\_\_\_\_

**Print Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Date:** \_\_\_\_\_