

# FACTS

## WHAT DOES BLEND FINANCIAL INC. DBA ORIGIN FINANCIAL (“ORIGIN”) 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:

- Account balances and transaction history
- Contact information and other identifiers
- Employment contact information, employment position information and salary information

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 Origin chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Origin 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	Yes	No
<b>For our marketing purposes—</b> to offer our products and services to you	Yes	No
<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

### Who we are

#### Who is providing this notice?

Blend Financial Inc. DBA Origin Financial

### What we do

#### How does Origin 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, limiting access to those personnel for whom access is appropriate, secured files and buildings, and other commercially reasonable measures to ensure the confidentiality of your personal information in accordance with policies and practices.

#### How does Origin collect my personal information?

We collect your personal information, for example, when you

- Open an account
- Give us your contact information
- Opt into additional products and services offered by us
- Connect us with other financial institutions that you use

#### 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.

<p><b>What happens when I limit sharing for an account I hold jointly with someone else?</b></p>	<p>Your choices will apply to everyone on your account.</p>
<p><b>Definitions</b></p>	
<p><b>Affiliates</b></p>	<p>Companies related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>■ Origin Investment Advisory LLC</li> </ul>
<p><b>Nonaffiliates</b></p>	<p>Companies not related by common ownership or control. They can be financial and nonfinancial companies.</p> <ul style="list-style-type: none"> <li>■ Nonaffiliates with whom we share can include non-financial service providers such as hosting platforms, data processors, web developers, and companies that help us market our own products that we believe may be of interest to you.</li> </ul>
<p><b>Joint marketing</b></p>	<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>■ Origin does not jointly market.</li> </ul>
<p><b>Other important information</b></p>	
<p><b>For Vermont Customers:</b> We will not share your information with companies outside of Origin, except for our everyday business purposes, for marketing our products and services to you, or with your consent. We will not disclose credit information about you within or outside Origin except as required or permitted by law.</p> <p><b>For Nevada Customers:</b> We are providing you this notice pursuant to state law. If you prefer not to receive marketing calls from us, please email <a href="mailto:hereforyou@useorigin.com">hereforyou@useorigin.com</a></p> <p><b>For California Customers:</b> We will not share your information with companies outside of Origin, except for our everyday business purposes, for marketing our products and services to you, or with your consent.</p>	

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