

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 notice for information on how to indicate your choice.

Affiliate Marketing



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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?

This 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.