

# COUNTERPOINTE ENERGY SOLUTIONS RESIDENTIAL, LLC

## PRIVACY STATEMENT

### IMPORTANT PRIVACY INFORMATION

#### Understanding Your Rights

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 financial companies to tell you how they collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

#### Our Commitment

This statement is being provided by CounterPointe Energy Solutions Residential, LLC which administers the origination of residential Property Assessed Clean Energy (“PACE”) under the AllianceNRG Program™ (the “Program”). We appreciate and respect the trust you show in providing your personal information to us. We value our relationship with you, so therefore, explaining to you how we collect, use, and protect your personal information is important to us.

#### Why We Collect Your Personal Information

We obtain and use your personal information to enable you to obtain financing for your property improvement projects which are eligible for PACE financing. We collect your personal information to identify you, confirm facts about you, and to help us assess your request for financing as well as to comply with the rules and requirements of the Program.

#### Information We Collect

We obtain your personal information from a variety of sources, such as:

- Information that you, or others on your behalf, provided on applications and other forms you submit to the Program, including identifying information such as name, address, telephone number, email address, Social Security number and credit-related information such as your assets, income, and liabilities. We also collect your name, email address and telephone number when you contact the Program with a question or complaint (i.e. through a visit to our website, a telephone call to our offices which may be monitored and recorded for security and other purposes and by fax or email correspondence you initiate with the Program.
- Information from your dealings and relationships with us, contractors which participate in the Program on your behalf, , and others, such as financing information, services provided to you, and how you perform on your outstanding credit obligations.
- Information from consumer reporting agencies such as your credit history and credit score.

- Information, such as employment status and demographic data, from outside sources like, employers, government agencies, marketing firms, and other sources.

### **Protecting Your Personal Information**

Safeguarding your personal information is important to us. We use systems, policies, and procedures that represent current best practices and which comply with federal law to maintain the accuracy of your personal information and to protect it from loss, misuse, or alteration. Your personal information is accessible by appropriate personnel who have a business need for your personal information. We provide training and communications programs to educate our personnel about the meaning and requirements of this statement.

### **How We Use Customer Information**

We use your personal information for our everyday business purposes such as to meet your requests for financing of your property improvement project under the Program, administer your account, comply with legal requirements, or report to credit bureaus.

### **Sharing Information with Unrelated Companies**

All financial companies need to share personal information to run their everyday business. In order to provide you with the services you request, we share your personal information with unrelated companies—companies that are not affiliated with us. This sharing allows us to service accounts, provide the services or products requested, report our experiences to credit bureaus, protect our business against fraud and unauthorized transactions, and respond to governmental requests and regulatory requirements, including reporting requirements of the Program. We do not share your personal information with other companies unless an agreement to protect your personal information is in place, except as otherwise permitted by law or regulation.

Most commonly, we may share your personal information with financial service providers and non-financial companies that provide services for us or on our behalf, such as companies that prepare account invoices or statements, help us service accounts, provide computer and systems support, and other services. We also share your personal information with the contractor you have selected to complete your property improvement project and we require that the contractor to maintain the confidentiality of your personal information and to use it solely for the purpose of completing your property improvement project.

We also share your personal information with municipalities, counties, joint power authorities and the agencies of the state in which your property is located as required by the terms of the Program and applicable laws and regulations.

Simply put, we share your personal information as necessary to effect, administer and consummate the financing of your property improvement project that you have requested we provide to you. We do not use your personal information in any fashion to market products or services to you other than the products and services directly related to the financing you have requested that we provide under the Program.

It is important to note that we do not sell your personal information and we do not provide your account or other personal information to non-affiliated third parties for the purpose of independent telemarketing or direct mail marketing of any products or services.

**State laws may give you additional rights to limit sharing. SEE BELOW FOR MORE ON YOUR RIGHTS UNDER STATE LAW.**

#### **Vermont and California Residents**

We do not share any of the personal information that we collect about you without your express written consent, except as otherwise explained in this notice.

#### **Nevada Residents**

Nevada law requires us to disclose that you may request to be placed on our internal "do not call" list at any time by calling 1-866-379-0019, and that we are providing this notice to you pursuant to state law, and that you may obtain further information by contacting the Nevada Attorney General, 555 E. Washington Ave., Suite 3900, Las Vegas, NV 89101; phone 702-486-3132; email [BCPINFO@ag.state.nv.us](mailto:BCPINFO@ag.state.nv.us).

#### **Texas Residents**

We are licensed and examined by the State of Texas-Office of Consumer Credit Commissioner. Call the consumer Credit Hotline or write for credit information or assistance with credit problems. Office of Consumer Credit Commissioner, 2601 North Lamar Boulevard, Austin, Texas 78705-4207, (800) 538 1579, [www.occc.state.tx.us](http://www.occc.state.tx.us).

#### **Future Changes**

This statement updates and replaces any previous statements you may have received from us about the collection, use and protection of your personal information. We may change this statement at any time and if we do, we will notify you as required by law.

#### **Your Questions**

If you have any questions regarding this statement, please contact us via email at [information@allianceng.com](mailto:information@allianceng.com), by fax at (855) 509-9923 or by telephone at (855) 509-9922. .