

**EXHIBIT A
Community Bank or Credit Union**

Marketer: _____

Mortgage Company: _____

Marketing Services to be Provided

(Place an "X" next to each item included)

The Marketing Fee is considered compensation for the following services that shall be provided by Marketer:

- Assist in the design of Mortgage Company joint marketing efforts and materials and meet with Mortgage Company on a regular basis to review and discuss ways to improve effectiveness. [A010]
- Display Mortgage Company marketing materials and signage at Marketer's sales offices and other locations generally available to the public, as applicable. [A020]
- Conduct email marketing campaigns, including information about the Mortgage Company, to Marketer's customers and prospective customers. [A030]
- Conduct direct mail marketing campaigns, including information about the Mortgage Company, to Marketer's customers and prospective customers. [A040]
- Include Mortgage Company information in Marketer's statements to depositors. [A100]
- Include Mortgage Company banner advertisement or marketing information and/or link to the Mortgage Company on Marketer's web site(s) and social media. [A050]
- Display Mortgage Company advertising in video/kiosk at locations generally available to the public. [A060]
- Grant Mortgage Company permission or a license to use Marketer's name and/or logo and/or trademark in Mortgage Company's marketing. [A070]
- Distribute Mortgage Company's brochures, fliers, business cards and other materials to Marketer's sales employees and agents. [A080]
- Name Mortgage Company as sponsor of Marketer's internal sales meetings, seminars and similar events at which Mortgage Company shall train and orient Marketer's sales employees and loan officers regarding Mortgage Company's products and services. [A090]

The following services are standard requirements of the Marketer as a party to this

Agreement and for which no fee is being paid:

- Conduct surveys of Marketer's customers on behalf of Mortgage Company, as requested.
- Provide Mortgage Company with monthly reporting of services, activity levels and other data, as requested.

_____ Date: _____
[Signature of Marketer's Representative]

By: _____
Name

Its: _____
Title

Mortgage Company Officer: _____

Mortgage Company Manager: _____

EXHIBIT B

Community Bank or Credit Union

Marketer: _____

Mortgage Company: _____

Scope of Service Activity Expectations

Full Legal Name and Address of Marketer _____ [B110]

_____ [B111]

_____ [B112]

_____ [B113]

Geographic Marketing Area(s) _____ [B120]

Contact Name, Email and Telephone _____ [B130]

_____ [B131]

_____ [B132]

Other Notes _____ [B140]

_____ [B141]

_____ [B142]

_____ [B143]

Effective Date _____ [B145]

Expectations:

Average amount of time that the Marketer will meet with Mortgage Company to design and review marketing efforts (# of person-hours per Month) _____ [B180]

Average number of Bank/CU Loan Officers/Sales people (#) _____ [B220]

Average number of Depositors (#) _____ [B224]

Average number of Offices/Other Locations with Mortgage Company marketing materials and signage:

with marketing materials (e.g., brochures/fliers/cards) inside _____ [B240]

with signage outside _____ [B243]

with affixed vertical signage inside _____ [B246]

Average number of recipients of marketing campaign Emails sent out by Marketer that market Mortgage Company (# per Month) _____ [B250]

Average percentage of Email content allocated to marketing Mortgage Company (%) _____ [B255]

Average number of recipients of marketing campaign Direct Mailings sent out by Marketer that market Mortgage Company (# per Month) _____ [B260]

Average percentage of Direct Mailing content allocated to marketing Mortgage Company (%) _____ [B265]

Average number of statement recipients (# per Month) _____ [B267]

Average percentage of statement content allocated to marketing Mortgage Company (%) _____ [B268]

Average number of Marketer web sites/social media that reference Mortgage Company (#) _____ [B270]

If available, Unique monthly visitor count (#) _____ [B272]

Average number of physical locations showing video loop or kiosk advertising (#) _____ [B300]

Average percentage of video content allocated to marketing Mortgage Company (%) _____ [B305]

Average number of hours of event Sponsorship by Mortgage Company (# of hours per Month) _____ [B310]

_____ Date: _____

[Signature of Marketer's Representative]

By: _____
Name

Its: _____
Title

Mortgage Company Officer: _____

Mortgage Company Manager: _____