

# Affiliated Business Arrangement Disclosure Statement

To: \_\_\_\_\_  
 From: \_\_\_\_\_

Property: \_\_\_\_\_  
 Date: \_\_\_\_\_

This is to give you notice that First Weber, Inc. and First Weber Illinois, LLC, together doing business as First Weber and/or First Weber, REALTORS® (“First Weber”), HomeServices Relocation, LLC, Prosperity Home Mortgage, LLC, Priority Title Corporation, Preferred Title, LLC, Schmitt Title, LLC, Wisconsin River Title Consultants LLC, HomeServices Insurance, Inc. doing business as HomeServices Insurance Agency (“HomeServices Insurance Agency”) and Title Resources Guaranty Company (“TRG”) are part of a family of companies (the “Affiliated Companies”) owned by HomeServices of America, Inc. (“HSoA”) and each may refer to you the services of another. First Weber, HomeServices Relocation, LLC, Prosperity Home Mortgage, LLC, Priority Title Corporation, and HomeServices Insurance Agency are each wholly owned either directly or indirectly by HSoA. HSW Affiliates Holding, LLC, a wholly-owned subsidiary of HSoA, has an ownership interest in each of the following Affiliated Companies: Preferred Title, LLC (40%), Schmitt Title, LLC (16%), Wisconsin River Title Consultants LLC (50%). In addition, Preferred Title, LLC has an ownership interest in Schmitt Title, LLC (16%). HomeServices Title Holdings, LLC, a wholly-owned subsidiary of HSoA, indirectly owns 13.5% of TRG. Because of these relationships, the referral of a customer (including you) by any of the Affiliated Companies to another may provide the referring company, its affiliates, and/or their employees with a financial or other benefit.

Set forth below is the estimated charge or range of charges for each of the services listed. You are NOT required to use any of these service providers as a condition of the sale of the subject property or to obtain access to any settlement service.

**THERE ARE FREQUENTLY OTHER SETTLEMENT SERVICE PROVIDERS AVAILABLE WITH SIMILAR SERVICES. YOU ARE FREE TO SHOP AROUND TO DETERMINE THAT YOU ARE RECEIVING THE BEST SERVICES AND THE BEST RATE FOR THESE SERVICES.**

Table 1 – First Weber and Affiliated Companies		
Service Provider	Service Provided	Charge or Range of Charges
HomeServices Relocation, LLC	Relocation Services	Fees paid by real estate broker
Prosperity Home Mortgage, LLC	Loan Origination and Application	\$0 - \$1,665 (2% of loan amount on some bond products)
	Appraisal	\$450 - \$2,100
	Third Party Fees	\$165 - \$550 (credit report, tax service, flood cert, technology, and/or MERS)
Priority Title Corporation	Lender’s Policy (may be provided by TRG)	\$450 - \$750 if simultaneously issued with Owner’s Policy; if not, issued at Owner’s Policy rates below.
	Owner’s Policy (may be provided by TRG)	For standard coverage, \$525 flat fee up to \$15k purchase price, plus \$3.50 per \$1k from \$15k-\$250k; add \$2.50 per \$1k from \$251k-\$500k; add \$1 per \$1k from \$500k-\$2M; add \$0.85 per \$1k from 2M-10M; add \$0.65 per \$1k from \$10M to \$50M; add \$0.55 per \$1k for over \$50M. Reissue rate available.
	Endorsements	\$0 - \$1,000 depending on coverages requested.
	Settlement Fee	\$125 - \$400
Preferred Title, LLC / Schmitt Title, LLC / Wisconsin River Title Consultants LLC	Lender’s Policy (may be provided by TRG)	\$400 - \$750 if simultaneously issued with Owner’s Policy; if not, issued at Owner’s Policy rates below.
	Owner’s Policy (may be provided by TRG)	For standard coverage, \$525 flat fee up to \$15k purchase price, plus \$3.50 per \$1k from \$15k-\$250k; add \$2.50 per \$1k from \$250k-\$500k; add \$1 per \$1k from \$500k-\$2M; add \$0.85 per \$1k from \$2M to \$10M; add \$0.65 per \$1k from \$10M-\$50M; add \$0.55 per \$1k over \$50M. Reissue rate available.
	Endorsements	\$0 - \$750 depending on coverages requested.
	Settlement Services Fee	\$45 - \$200 deed and document preparation fees; \$125 - \$475 escrow/settlement fees
HomeServices Insurance Agency*	Homeowner’s Insurance	\$150 - \$10,000 plus per year; charges may vary based on coverage requested and other factors including multi-unit properties. Flood Insurance is not included in this estimate but may be available for an additional fee and may be lender required.

**ACKNOWLEDGEMENT:** I/we have read this disclosure form and understand that the Affiliated Companies may refer me/us to purchase the settlement service(s) described on **Table 1** above and that any such referrals may provide the Affiliated Companies and/or their employees with a financial or other benefit. I/we also understand that the Interested Parties may refer me/us to purchase the settlement service(s) described on **Table 2** (in the attached supplemental statement) and that any such referrals may provide the Interested Parties with a financial or other benefit.

Signature \_\_\_\_\_ (Date) \_\_\_\_\_ Signature \_\_\_\_\_ (Date) \_\_\_\_\_

\* In rare cases, your insurance policy may instead be issued by Long & Foster Insurance Agency, Inc., an affiliate of HomeServices Insurance, Inc., or under another of its trade names. HomeServices Insurance, Inc.’s trade names include: Edina Realty Insurance Agency, HomeServices Insurance Agency, InsuranceSouth, Long Insurance Group, ReeceNichols Insurance and Trident Insurance Agency.

## Supplemental Affiliated Business Arrangement Disclosure Statement Interested Parties and Additional Providers

Neither First Weber nor any other HSoA-affiliated company has any ownership interest in Universal Home Protection, LLC; Dependable Title of Wisconsin, LLC; and Point Title, LLC (collectively, “Additional Providers”). This is to give you notice, however, that some officers, employees, and real estate agents of First Weber (“Interested Parties”), individually or together, own interests in the Additional Providers. The Interested Parties are Shawna Alt, J. Michael Baker, Paul Brown, Robert Bushman, Barbara Clinard, Diana Gerke, James R. Imhoff, Jr., Daniel Lee, Carole Lukens, Heidi Mancheski, Gregory Onsager, Sharon Rapkin, David Roark, Darlene Wahls, Robert Weber, and Ruth Ann Weber. The Interested Parties’ collective ownership interests in the Additional Providers are as follows: Universal Home Protection, LLC (33.3%), Dependable Title of Wisconsin, LLC (31.5%), and Point Title, LLC (62.5%). Because of these relationships, the referral of a customer (including you) by any of the Interested Parties to the Additional Providers may result in one or more of the Interested Parties receiving a financial or other benefit.

Set forth below is the estimated charge or range of charges for each of the Additional Providers’ listed services. You are NOT required to use any of these service providers as a condition of the sale of the subject property or to obtain access to any settlement service.

**THERE ARE FREQUENTLY OTHER SETTLEMENT SERVICE PROVIDERS AVAILABLE WITH SIMILAR SERVICES. YOU ARE FREE TO SHOP AROUND TO DETERMINE THAT YOU ARE RECEIVING THE BEST SERVICES AND THE BEST RATE FOR THESE SERVICES.**

Table 2 – Interested Parties and Additional Providers		
Service Provider	Service Provided	Charge or Range of Charges
Universal Home Protection, LLC	Home Warranty	\$625 for a Basic Plan. Additional coverages and plans available.
Dependable Title of Wisconsin, LLC	Lender’s Policy	\$525
	Owner’s Policy	\$525 for policies \$15,000 and under, plus \$3.50 for each additional \$1,000 or less of coverage up to \$250,000, plus \$2.50 for each additional \$1,000 or less of coverage between \$250,001 and \$500,000, plus \$1 for each additional \$1,000 or less of coverage between \$501,000 and \$2,000,000. Reissue rate available at 15% discount, with a \$525 minimum.
	Special Assessment/Verification	\$20 - \$50
	Endorsements	\$0 - \$500 depending on coverages requested.
	Deed Preparation Fee	\$100 - \$150
	Closing Fee	\$250-\$350, plus \$25 per wire and \$100 for overnight service.
Point Title, LLC	Lender’s Policy	\$450
	Owner’s Policy	\$525 for policies \$15,000 and under, plus \$3.50 for each additional \$1,000 or less of coverage up to \$250,000, plus \$2.50 for each additional \$1,000 or less of coverage between \$251,000 and \$500,000, plus \$1 for each additional \$1,000 or less of coverage between \$501,000 and \$1,000,000. Reissue rate available at 15% discount, with a \$525 minimum.
	Special Assessment/Verification	\$75 minimum; varies by municipality and number of parcels.
	Endorsements	\$0 - \$500 depending on coverages requested.
	Deed Preparation Fee	\$125
	Closing Fee	\$200-\$350, plus \$50 per wire and \$40 overnight package.

[see acknowledgment on the preceding page]