VISITING FINANCIAL INSTITUTION AGREEMENT
SCHEDULATED CAMPUS EVENTS

Financial Institutions, including banks, savings and loan associations, credit unions, pension funds, and insurance companies in attendance at scheduled campus events, whether to host, co-host, sponsor or solicit business, are required to enter into this agreement with the University, (prior to the start of that event), to ensure compliance to the Code of Federal Regulations, Federal Family Education Loan (FFEL) program §682. The following dictates those transactions which are allowable and those transactions that are prohibited, in which visiting financial institutions must abide while on the UNO Campus.

ALLOWABLE TRANSACTIONS

- Display products and services to provide information and assistance to students as it relates to the availability of services—other than student loans.
- Provide consultation on services—other than student loans; such as to checking and savings accounts;
- Open new accounts or make changes to existing accounts—other than student loans;
- A lender, in carrying out its role in the Federal Family Education Loan (FFEL) program and in attempting to provide better service, may provide:
  - Support of and participation in a school's or a guaranty agency's student aid and financial literacy-related outreach activities, excluding in-person school-required initial or exit counseling, as long as the name of the entity that developed and paid for any materials is provided to the participants and the lender does not promote its student loan or other products;
  - Meals, refreshments, and receptions that are reasonable in cost and scheduled in conjunction with training, meeting, or conference events if those meals, refreshments, or receptions are open to all training, meeting, or conference attendees; and
  - Items of nominal value to schools, school-affiliated organizations, and borrowers that are offered as a form of generalized marketing or advertising, or to create good will.

PROHIBITED TRANSACTIONS

- Payments or offerings of other benefits, including prizes or additional financial aid funds, to a prospective borrower in exchange for applying for or accepting a FFEL loan from the lender;
- Payments or other benefits to a school, any school-affiliated organization or to any individual in exchange for FFEL loan applications, application referrals, or a specified volume or dollar amount of loans made, or placement on a school's list of recommended or suggested lenders;
- Payments or other benefits provided to a student at a school who acts as the lender's representative to secure FFEL loan applications from individual prospective borrowers;
- Payments or other benefits to a loan solicitor or sales representative of a lender who visits schools to solicit individual prospective borrowers to apply for FFEL loans from the lender;
- Payment to another lender or any other party of referral fees or processing fees, except those processing fees necessary to comply with Federal or State law;
- Solicitation of an employee of a school or school-affiliated organization to serve on a lender's advisory board or committee and/or payment of costs incurred on behalf of an employee of a school or school-affiliated organization to serve on a lender's advisory board or committee;
- Payment of conference or training registration, transportation, and lodging costs for an employee of a school or school-affiliated organization;
- Payment of entertainment expenses, including expenses for private hospitality suites, tickets to shows or sporting events, meals, alcoholic beverages, and any lodging, rental, transportation, and other gratuities related to lender-sponsored activities for employees of a school or a school-affiliated organization;
- Philanthropic activities, including providing scholarships, grants, restricted gifts, or financial contributions in exchange for FFEL loan applications or application referrals, or a specified volume or dollar amount of FFEL loans made, or placement on a school's list of recommended or suggested lenders; and
- Staffing services to a school, except for services provided to participating foreign schools at the direction of the Secretary, as a third-party servicer or otherwise on more than a short-term, emergency basis, and which is non-recurring, to assist a school with financial aid-related functions.
- Conducted unsolicited mailings to a student or a student's parents of FFEL loan application forms, except to a student who previously has received a FFEL loan from the lender or to a student's parent who previously has received a FFEL loan from the lender;
- Offered, directly or indirectly, a FFEL loan to a prospective borrower to induce the purchase of a policy of insurance or other product or service by the borrower or other person; or
- Engaged in fraudulent or misleading advertising with respect to its FFEL loan activities.

As a representative of my Financial Institution, my signature indicates that I have read this agreement and shall abide by its terms and conditions.

FINANCIAL INSTITUTION  (NAME / LOCATION)

REPRESENTATIVE’S NAME  (PLEASE PRINT)

REPRESENTATIVE’S SIGNATURE  DATE

TO BE COMPLETED BY UNO DEPARTMENT

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Originals are to be maintained on file in Department booking the event, for the current fiscal + 3 years.