

From: Priester, Nicole <NicolePriester@gov.sc.gov>
Required: Priester, NicoleNicolePriester@gov.sc.gov
Webb, BethBethWebb@gov.sc.gov
Symmes, BrianBrianSymmes@gov.sc.gov
Godfrey, RobRobGodfrey@gov.sc.gov
Adams, ChaneyChaneyAdams@gov.sc.gov
Moore, CamlinCamlinMoore@gov.sc.gov
Subject: Economic Development Ribbon Cutting: Movement Mortgage
Location: Movement Mortgage National Sales Support Center, 8024 Calvin Hall Road, Fort Mill, S.
C.
When: 3/11/2016 10:55:00 AM - 12:00:00 PM

Advance: Charlotte McKee
(803)209-1057
Brian Welch
(864)982-3937

EVENT: Movement Mortgage Grand Opening

DATE: March 11, 2016

TIME: 10:55 AM

LOCATION: Movement Mortgage National Sales Support Center, 8024 Calvin Hall Road, Fort Mill, SC 29707

PARKING: VIP parking will be reserved for the Governor and staff in front of the building. Casey Crawford and Adam O'Daniel (Movement communications director) will meet the Governor in front of the main entrance and escort her from the parking area to a private office suite to meet with executives.

PURPOSE: To congratulate the company on their grand opening.

LOCATION SET-UP: The event will be indoors with climate control. The event will take place in the first-floor lobby, with the Governor speaking on a stage facing approximately 150 seated guests and 300+ employees in standing room only areas.

ON-SITE LOCATION CONTACT: Adam O'Daniel, Movement Mortgage Communications Director: (704) 562-2117 or David King, Movement Mortgage Chief Brand Officer: (757) 289-7117.

PROJECT NAME: Project Wahoo – closed in May 2014. There is an open expansion project with Megan Anderson, Project Top 40, which is an additional \$15.5 million investment and 330 jobs.

COMPANY NAME: Movement Mortgage

PROJECT MANAGER: Mandy Brawley

CITY AND COUNTY: Indian Land / Lancaster County

JOBS NUMBER AND INVESTMENT NUMBER: 600 jobs / \$22 million

SEATED ON STAGE: The Governor will be seated on a 20-foot by 8-foot stage, alongside CEO Casey Crawford and Executive Vice President Toby Harris. Diagram attached.

VIDEOGRAPHER/PHOTOGRAPHER: Movement Mortgage will supply both a photographer and videographer and will share media with the Governor's Office.

KEY COMPANY PERSONS:

Casey Crawford – Founder and CEO
Toby Harris – Executive Vice President and Co-Founder
John Third – Chief Operating Officer
Laura Bowles – Chief Financial Officer
David King – Chief Brand Officer

NOTABLE CONFIRMED ATTENDEES:

S.C. Senator Greg Gregory
Lancaster County Councilman Steve McCullough (District 1)
Lancaster County Administrator Steve Willis
Various senior leaders from Choate Construction Co. and prominent local real estate agents.

GIFT: Framed brass plate that will be sitting in the Governor's chair on stage.

PRESS: Yes

PUBLIC: Yes

ACCESS TO EMPLOYEES: Employees will be present in the building. Some will be invited to attend the ceremony, others will remain in work areas throughout the building.

INTRODUCED BY: Casey Crawford, CEO and Founder of Movement Mortgage

LENGTH OF SPEAKING: 5 minutes

LINE-BY-LINE:

- 10:55 AM Gov. Haley will be greeted by Adam O'Daniel and Casey Crawford and escorted to the stage
- 11:01 AM Gov. Haley, CEO Casey Crawford, EVP Toby Harris, Lancaster County Councilman Larry McCullough and DC Washington take seats on stage
- 11:02 AM Welcome
Mr. Casey Crawford, Co Founder and Chief Executive, Movement Mortgage
- 11:03 Am Invocation
Mr. Toby Harris, Co Founder and Executive Vice President, Movement Mortgage
- 11:04 AM Proclamation of Movement Mortgage Day
The Honorable Larry McCullough, District 1 Representative, Lancaster County Council
- 11:06 AM Introduction of Gov. Nikki Haley
Mr. Casey Crawford, Co Founder and Chief Executive, Movement Mortgage
- 11:07 AM Keynote Address
The Honorable Nikki Haley, Governor, State of South Carolina
- 11:13 AM Dedication of Building
Mr. Casey Crawford, Co Founder and Chief Executive, Movement Mortgage
- 11:18 AM Presentation of Colors
Indian Land High School ROTC
- 11:20 AM Singing of National Anthem
Mr. DC Washington

- 11:23 AM Ribbon Cutting
Mr. Casey Crawford, Co Founder and Chief Executive, Movement Mortgage
-Joined by Gov. Haley, Toby Harris and Larry McCullough at center stage.
- 11:25 AM Conclusion
- 11:30 AM Press Conference (located in upstairs conference room)
Gov. Haley and Casey Crawford to host brief Q&A session with media
- 11:40 AM Building Tour
Casey Crawford to walk Gov. Haley through building for photos with media
- 12:00 PM Governor Departs

HISTORY OF COMMUNICATION: Gov. Haley spoke with Casey Crawford in August 2014 and December 2014. Also, the Governor attended the groundbreaking in March 2015.

COMPANY OVERVIEW:

- Movement Mortgage was created in 2008.
- Casey Crawford is the co-founder and CEO of Movement Mortgage and is located in Charlotte, NC.
- In 2008, Crawford and Toby Harris established Movement Mortgage (formerly New American Mortgage).
- From 2002-2003, Casey was a member of the Super Bowl XXXVII Champion Tampa Bay Buccaneers. He played tight end for the Carolina Panthers in 2000 and 2001 and was also drafted by the Atlanta Braves in 1995. Following his NFL career, Casey entered the real estate market as an agent and investor.
- Casey attended the University of Virginia where he earned a B.A. in Sociology and achieved All-ACC academic honors.
- He has a passion for philanthropy and is an active member of his church.
- Over the next ten years, Crawford and Harris plan to transfer 100% of Movement Mortgage's shares to its non-profit foundation, Movement Foundation (after taking care of customers and employees). Crawford intends for all dividends to be paid be used to invest in community centers and charter schools. (Source: Charlotte Business Journal, Interview with Casey Crawford, May 1, 2015)
- Crawford's philanthropic philosophy is shaped by a deep personal faith, the example of a grandfather, a near-disaster after the NFL and a desire to apply a personal moral standard to his business.

DESCRIPTION OF BUSINESS

- Movement Mortgage is a mortgage bank providing mortgage loans in the United States. The company offers fixed rate mortgage loans, including Federal Housing Administration loans, Veteran's Affairs loans, and state mortgage programs for homebuyers. The company also provides refinance and reverse mortgage loans.
- The company has more than 350 locations in 40 states employing more than 3000 people. In 2015, Movement originated more than \$7.8 billion in residential mortgages. (Source: Movement Mortgage)
- Inc. Magazine recognized Movement Mortgage as the fastest-growing mortgage bank in the country.

COMMUNITY INVOLVEMENT

- The Movement Foundation, the non-profit arm of the company has reinvested more than \$16 million in communities to date. (Source: Movement Mortgage)
- Movement Foundation also acts as a source of support to those employed at Movement Mortgage and its affiliated companies - Love Works Fund. The Fund is comprised of employee contributions (as of 2015, 70% employee participation), which is matched 100% by the Movement Foundation. (Source: Movement Foundation)
- The newly constructed Movement Center in Charlotte, North Carolina will house number of ministries and local non-profit organizations. The center's first tenant The Harvest Center of

- Charlotte works with the situationally homeless.

SOUTH CAROLINA OPERATIONS

- Movement Mortgage began to move into its \$22 million Indian Land, SC headquarters in February 2016 with 615 of the promised 650 jobs already filled. The Indian Land headquarters also functions as a fulfillment center. Source: Charlotte Business Journal, Interview with Casey Crawford, Feb. 26, 2016
- Movement Mortgage announced plans to move its national headquarters from Virginia to northern Lancaster County creating over 600 jobs in January 2015. The company will invest \$22 million in building the new, 104,000-square-foot headquarters in Indian Land, SC.

COMPANY BRAGGING POINTS:

- Movement Mortgage started in two locations with four employees and has grown to over 450 locations and 3,000 employees.
- Inc. 500 named Movement Mortgage the #1 Fastest Growing Mortgage Bank in the United States.

SUGGESTED TALKING POINTS:

- It is another great day in South Carolina!
- We could not be more excited to celebrate Movement Mortgage becoming one of the newest members of the South Carolina family.
- We were excited to hear the news last year that this fantastic company was moving to South Carolina, but it's honestly just a little more special to actually be here to see the project come to fruition, and to see where these 650 employees come to work every day.
- That is 650 families that will be supported by Movement Mortgage's commitment to our state.
- And I can promise you that we do not take that commitment lightly. We recognize that this is an important day for the company, for our state, and for the community here in Lancaster County.
- We also recognize the trust that Casey Crawford and the rest of the leadership at Movement have placed in us, and one thing I can promise you is that we will always have your back.
- People have called South Carolina the birth place of the American Manufacturing Renaissance, and that's something that we're extremely proud of.
- But South Carolina has also been called the friendliest state in the country, and that's where companies in the customer service business, like this one, come in.
- Just like in the manufacturing industry, our service industry is growing so quickly because of our people.
- The South Carolinians who make up our workforce are the reason our economy is on the move in every industry.
- When a company like Movement Mortgage is looking for a new place to call home, they know what they're going to get in South Carolina because our workforce has built a reputation as

- one of the hardest-working, most skilled, and most loyal in the world.
- That workforce has proven they can do it all.
- From manufacturing some of the most impressive products you'll ever see to providing world-class customer service and managing one of the nation's most innovative mortgage processes, South Carolinians take great pride in their work.
- Recognizing this, Movement Mortgage chose to invest more than \$20 million to establish their national headquarters here, making a significant commitment to our state and to this community.
- We're always proud to have innovative, forward-thinking companies that are on the rise decide to do business here, and that's exactly what Movement Mortgage is.
- In 2010, Movement Mortgage employed 215 workers. Today, their total employment exceeds 3,000.
- Also, the company originated approximately \$430 million in home loans in 2010. In 2015, that figure exceeded \$7.8 billion.
- I know that with this company's leadership and all of Team South Carolina working together, those numbers are only going to continue to grow, and this company has even brighter days ahead.
- Thank you, and God bless.

Casey Crawford
Chief Executive and Co-Founder

Casey Crawford is the co-founder and CEO of Movement Mortgage. Under his leadership, the company has become one of the top 25 purchase mortgage banks in the country, generating over \$214 million in annual revenue in 2014. In 2012 and 2013, Movement earned recognition as the fastest growing privately held mortgage bank in the country by Inc. Magazine.

From 2002-2003, Casey was a member of the Super Bowl XXXVII Champion Tampa Bay Buccaneers. He played tight end for the Carolina Panthers in 2000 and 2001 and was also drafted by the Atlanta Braves in 1995. Following his NFL career, Casey entered the real estate market as an agent and investor. His exploration of mortgage lending connected him with Toby Harris, a correspondent lender with National City Mortgage at the time. Together, they established Movement Mortgage.

Casey attended the University of Virginia where he earned a B.A. in Sociology and achieved All-ACC academic honors. He has a passion for philanthropy, is an active member of his church and enjoys hunting, Brazilian jiu-jitsu and CrossFit. Casey lives in Charlotte, NC, with his wife, Michelle, and two daughters.

TOBY HARRIS

Executive Vice President and Co-Founder

Toby Harris is the co-founder and EVP of Movement Mortgage, helping transform the company from a start-up into an industry leader with more than 3,000 employees. His vast experience in the mortgage and real estate industry has proven essential in leading and supporting its growth.

Prior to Movement, Toby served as the East Coast Partnership and Marketing Service Agreement Director for National City Mortgage. While there, he developed and implemented the company's national partnership platform, establishing and managing over 50 joint venture partnerships with real estate companies spanning the east coast. He has also served in positions including military serviceman, EMT and sheriff.

Toby is an Iron Man competitor, deep diving scuba instructor and is president and board member of Virginia Beach Project Lifesaver. He loves to bike, run and teach classes at church whenever possible. Toby has three sons and lives with his wife in Virginia Beach, VA.

JOHN THIRD

Chief Operating Officer

John Third is the Chief Operating Officer for Movement Mortgage, responsible for the company's nationwide operations, including all processing, underwriting and technical support for loan officers and sales teams. John ensures loan officer satisfaction and reinforces Movement's Upfront Underwriting and 7 Day Processing standards.

Prior to joining Movement Mortgage in 2008, John worked at National City Mortgage where he most recently held the position of Vice President of Construction and Renovation Loans. He joined Movement in its launch phase as an operations manager and was head of compliance for a time before becoming COO.

John holds a B.S. in Mathematics with Computer Science from Robert Gordon University. He was born and raised in Scotland, and after college relocated to Virginia Beach, VA. He currently lives in Charlotte, NC, and enjoys CrossFit and renovating homes.

LAURA BOWLES

Chief Financial Officer

Laura Bowles is the Chief Financial Officer at Movement Mortgage. As CFO, Laura is responsible for the

company's accounting, financial planning and investing activities. She also works with senior leadership on strategic planning and development to forecast and guide the future direction of the company.

Laura came to Movement in early 2014 a seasoned financial professional whose career catalog includes home loans risk management at Bank of America, a CFO for several Wachovia business units and most recently Director and Head of Consumer and Small Business Lending Products at Citibank. Previous roles also include positions at Liz Claiborne, Chase Capital and Merrill Lynch. Laura holds a BSE from Princeton University and an MBA from Harvard Business School. She lives with her husband and two children in Charlotte, NC, and enjoys working out and making the most of nice weather with family trips to the mountains.

DAVID KING

Chief Brand Officer

David King is Movement Mortgage's Chief Brand Officer, in charge of branding and head of the marketing department. In addition to overseeing brand development and advertising, David is on mission to raise the bar on marketing creativity and presentation within the mortgage industry. Under David's leadership, Movement Mortgage has become widely recognized for its innovative, state-of-the-art branding approach.

Prior to joining Movement, David owned and operated a media production business, creating promotional video, brand design and digital art for companies and organizations. He brought his talent and skills to Movement Mortgage in 2011 as the director of video marketing. His background also includes sales for a national security corporation, during which he rose to a top producer on the east coast.

David spent the first seven years of his life in Scotland and lived in England until age 14 when his family relocated to Hampton Roads, Virginia. He enjoys CrossFit and spending time on a lake or at the beach with his wife, son and daughter.