

Steadfast Wealth Planning

SMS Terms & Conditions

1- SMS Consent Communication:

The information (Phone Numbers) obtained as part of the SMS consent process will not be shared with third parties for marketing purposes.

2- Types of SMS Communications:

If you have consented to receive text messages from [Company Name], you may receive messages related to the following (provide specific examples):

- Appointment reminders
- Follow-up messages
- Billing inquiries
- Promotions or offers (if applicable) {If you see the customer selected a conversational use case, do not add this reference to your email thread, instead, make sure the customer adds the matching use cases to this portion of the Terms info}.

Example: "Hello, this is a friendly reminder of your upcoming appointment with Cody at Steadfast Wealth Planning on [Date] at [Time]. You can reply STOP to opt out of SMS messaging from Steadfast Wealth Planning at any time."

3- Message Frequency:

Message frequency may vary depending on the type of communication. For example, you may receive up to [2] SMS messages per week related to your [appointments/billing, etc.].

Example:

"Message frequency may vary. You may receive up to 2 SMS messages per week regarding your appointments or account status."

4- Potential Fees for SMS Messaging:

Please note that standard message and data rates may apply, depending on your carrier's pricing plan. These fees may vary if the message is sent domestically or internationally.

5- Opt-In Method:

You may opt-in to receive SMS messages from Steadfast Wealth Planning in the following ways (This is an example. Please include the method used.)

- Verbally, during a conversation

6- Opt-Out Method:

You can opt out of receiving SMS messages at any time. To do so, simply reply "STOP" to any SMS message you receive. Alternatively, you can contact us directly to request removal from our messaging list.

7- Help:

If you are experiencing any issues, you can reply with the keyword HELP. Or, you can get help directly from us at (insert the link)

Additional Options:

- If you do not wish to receive SMS messages, you can choose not to check the SMS consent box on our forms.

8- Standard Messaging Disclosures:

- Message and data rates may apply.
- You can opt out at any time by texting "STOP."
- For assistance, text "HELP" or visit our [Privacy Policy] and [Terms and Conditions] pages.
- Message frequency may vary