

SMS Messaging Terms of Service

SMS Messaging Program

This SMS messaging program allows advisors and clients to converse and exchange SMS messages in a legally compliant manner. Message topics may include client support, appointment scheduling, informational communications, service updates, and general client interaction. Trading requests are not accepted via text.

SMS messaging is intended for administrative, service-related, and general informational purposes. Clients should not use SMS messaging to transmit sensitive personal information, account credentials, trade instructions, or other confidential financial information.

Opt-Out Instructions

You can cancel SMS messaging at any time by texting **STOP** to the phone number from which you received the message.

After you send the SMS message **STOP**, we will send you an SMS message confirming that you have been unsubscribed. After this confirmation, you will no longer receive SMS messages from us at that phone number.

If you wish to receive SMS messages again, you may opt back in by contacting us or otherwise providing consent in the same manner you originally joined the messaging program.

Help Instructions

If you are experiencing issues with the messaging program, you can reply with the keyword **HELP** for more assistance. Or call your Advisor's business phone.

Message Frequency

Message frequency will vary because the messaging program is conversational in nature. The number of messages you receive will depend on your interactions with us and the services or information requested.

Message and Data Rates

Message and data rates may apply for any messages sent to you from us and to us from you. If you have questions about your text messaging plan or data plan, please contact your wireless provider.

Carriers are not liable for delayed or undelivered messages.

Privacy Policy

If you have any questions regarding privacy, please review our privacy policy:

<https://unitedplanners.com/privacy-policy/>

Contact Information

Please feel free to reach out with any questions:

- **Business name:** C7 Capital Group
- **Email:** daniel@c7capitalgroup.com
- **Phone number:** 714-264-5055
- **Website:** www.c7capitalgroup.com

Important Financial Services Notice

SMS messages are not intended to provide individualized investment advice, financial planning advice, tax advice, legal advice, or recommendations to buy or sell any security or financial product. Any investment-related communication should be discussed directly with your financial professional through appropriate approved communication channels.

Please do not send sensitive personal, financial, account, or transaction information by SMS. If you need to provide confidential information, contact our office for instructions on an approved secure method of communication.