

SMS Terms and Conditions

By subscribing to our services, you agree to the following terms and conditions regarding messaging and communications:

Types of SMS Communications:

If you have consented to receive text messages from Reshape Wealth, you may receive messages related to requested appointment reminders, follow-ups after visits, and responses to your inquiries.

Sample Message: Hello. Thank you for contacting Reshape Wealth, how can we help you? Reply STOP to opt-out at any time. For assistance, text "HELP" or visit our website at www.reshapewealth.com. See our Privacy Policy & Terms of Service for more information, Message and data rates may apply.

Message Frequency: Message frequency may vary depending on the type of communication. Our SMS message frequency will be from 50 to 500 text messages daily across all users.

Potential Fees: Standard messaging and data rates may apply depending on your mobile carrier and plan. You are responsible for any charges incurred from receiving messages. We recommend checking with your mobile provider for any applicable fees.

Opt-In Method: To opt in to our messaging service, you must provide explicit consent by filling out a form on our website or by signing a consent form. The form will explicitly state your consent to receive messages. This process ensures you are aware of and agree to the communication terms before receiving any messages from us.

Opt-Out Method: You can opt out of receiving further messages at any time by replying with 'STOP'. After opting out, you will no longer receive further messages unless you opt back in through the same process. Opting out may affect your access to certain services that require messaging.

Help: If you are experiencing any issues, you can reply with the keyword

HELP. Or, you can get help directly from us at www.reshapewealth.com

Privacy Policy: For more information about how we collect, use, and protect your personal data, please refer to our Privacy Policy (<https://www.reshapewealth.com/private-policy/>) Our Privacy Policy provides further details on the types of data we collect, how it is used, and your rights regarding your personal information.

SEC Rule 204-2, requires Registered Investment Advisors (RIAs) to archive communications and preserve certain records, including text communications, for at least five years. By engaging in text communications with us, you consent to the archiving and preservation of these messages for the required time-period. If you have any concerns or questions about this policy, please feel free to reach out.

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 at <https://www.reshapewealth.com/private-policy> and Terms and Conditions at <https://www.reshapewealth.com/terms-conditions/> pages.

Message frequency may vary

Contact Consent: _____

Spousal Consent: _____

Name: _____

Name: _____

Date: _____

Date: _____