

SMS Terms of Service

Effective Date: July 20, 2026

These SMS Terms of Service describe the text messaging program offered by Pursuit Wealth Planning (“Pursuit Wealth Planning,” “PWP,” “we,” “us,” or “our”).

1. SMS Messaging Program

By opting in to receive text messages from Pursuit Wealth Planning, you may receive SMS or MMS messages related to:

- Appointment scheduling, confirmations, and reminders
- Client service and administrative communications
- Requests to contact our office
- General account-service updates
- Educational or informational communications
- Responses to questions or messages you initiate
- Other general communications related to our services

Our text messaging program is primarily conversational. Message frequency will vary depending on your interactions with our office.

2. Consent to Receive Messages

You will receive text messages from Pursuit Wealth Planning only after you have provided consent or initiated a text message conversation with us.

Your consent to receive text messages is voluntary. By providing your mobile phone number, you represent that you are the owner or authorized user of that number. Please notify us promptly if your mobile number changes or is reassigned.

3. Opting Out

You may cancel SMS messaging at any time by replying **STOP** to any message you receive from us.

After you reply STOP, you may receive a final message confirming that you have been unsubscribed. You will then no longer receive SMS messages from us unless you subsequently provide consent to participate again.

Opting out of text messages will not prevent you from receiving communications from us through other methods, such as telephone, email, or postal mail.

4. Help and Support

For assistance with our SMS messaging program, reply **HELP** to any message you receive from us.

You may also contact us directly:

Pursuit Wealth Planning

Email: pursuit@pursuitwp.com

Phone: 303-470-5534

Website: www.pursuitwp.com

5. Message Frequency and Charges

Message frequency varies because our messaging program is conversational in nature.

Message and data rates may apply to messages sent to you from us and to messages you send to us. Pursuit Wealth Planning does not charge a separate fee for participating in the SMS messaging program.

Please contact your wireless carrier if you have questions regarding your text messaging or data plan.

6. Message Delivery

Wireless carriers are not responsible for delayed or undelivered messages. Message delivery is subject to the availability and reliability of your wireless network and carrier services.

We cannot guarantee that every text message will be received or delivered within a particular timeframe.

7. Financial and Account Instructions

Text messaging should not be used to provide sensitive personal or financial information, including Social Security numbers, passwords, complete account numbers, or other confidential information.

Do not use text messaging to submit:

- Securities trade or investment instructions
- Distribution or withdrawal requests

- Money-movement instructions
- Changes to account ownership or beneficiary information
- Time-sensitive financial or account instructions

Such requests will not be accepted or acted upon through text messaging. Please contact our office directly using an approved communication method for assistance with these matters.

Text messages are not continuously monitored and should not be used for urgent requests.

8. Privacy

Pursuit Wealth Planning respects your privacy. Mobile phone numbers, SMS opt-in information, and messaging consent will not be sold or shared with third parties or affiliates for their marketing or promotional purposes.

We may use service providers to help operate our text messaging system, but they may use information only as necessary to provide those services on our behalf.

For more information about how we collect, use, and protect personal information, please review our Privacy Policy:

<https://static.twentyoverten.com/5a81ef501446f2608b323c09/P0JceLFRsmyX/Privacy-Policy-Statement.pdf>

9. Changes to These Terms

We may update these SMS Terms of Service periodically. Any changes will be posted on this publicly accessible webpage with an updated effective date.

Your continued participation in the SMS messaging program after changes are posted constitutes acceptance of the revised terms.

10. Contact Us

Questions regarding these SMS Terms of Service may be directed to:

Pursuit Wealth Planning
1950 W Littleton Blvd, Unit 115
Littleton, CO 80120
pursuit@pursuitwp.com

303-470-5534
www.pursuitwp.com

