

SMS PRIVACY POLICY

SMS / Text Message Service Privacy Policy

Company Name: Davis Wealth Advisors

Overview

This Text Message Service (“Service”) enables **conversational, person-to-person text messaging** between you and our employees using **Microsoft Teams SMS**. This Service is not used for marketing, promotional, bulk, or automated messaging.

This policy applies only to the Text Message Service and does not modify our general Privacy Policy, which may govern our relationship with you in other contexts.

Information We Collect and How We Use It

We respect your privacy. We use only the information you provide through this Text Message Service to transmit your mobile messages and respond to you. This may include:

- Your mobile phone number
- The content of text messages sent and received
- Message metadata (such as timestamps and delivery status)

We use this information solely to operate, support, and secure the Text Message Service.

Information Sharing

We may share limited information with messaging platform providers (such as Microsoft), telecommunications carriers, and vendors that assist us in delivering text messages.

Mobile information will not be shared with third parties or affiliates for **marketing or promotional purposes**. Text messaging originator opt-in data and consent are excluded from all such sharing and will **not** be shared with any third parties.

We may disclose information only as required to comply with applicable laws, lawful governmental requests, or to protect our legal rights, security, or property.

Consent and Opt-In

You receive text messages from us **only if you have provided express consent**, such as by:

- Initiating a text message conversation with us
- Requesting communication via text message
- Submitting a form or inquiry that includes SMS consent

By engaging in text message communication with us, you consent to receive messages related to your inquiry or ongoing conversation.

Message Frequency

Message frequency varies and depends on your interaction with us. Messages are typically sent **only in response to your inquiries or requests.**

Costs

We do not charge you for the Text Message Service. However, **message and data rates may apply** based on your mobile carrier plan. Charges are billed by your carrier or applicable provider.

Opting Out

You may opt out of receiving text messages at any time by replying with STOP at any time

After you opt out:

- You will no longer receive text messages from that specific conversation and phone number.
- We may send **one final confirmation message** acknowledging your opt-out.

Because this is a person-to-person communication service, opt-out requests apply **per conversation and per phone number**. To resume communication, you must initiate a new conversation or provide renewed consent.

Help and Support

For help with this Text Message Service, you may:

- Reply HELP to any message
- Email: team@daviswealthadvisors.net
- Call: 603-836-3477

SMS TERMS OF USE

SMS / Text Messaging Terms and Conditions

By providing your mobile phone number and opting in, you consent to receive **person-to-person, conversational SMS messages** from **Davis Wealth Advisors**.

Messages may include client inquiries, appointment or meeting coordination, service or support updates, IT and phone service communications related to business operations, and other **non-marketing informational communications** initiated by your client relationship or support request.

Consent & Opt-In

You may opt in to receive SMS messages from **Davis Wealth Advisors** through direct communication, online forms, service agreements, or by explicitly requesting SMS communication during support interactions. Consent is collected in a direct and verifiable manner.

Message Frequency

Message frequency varies based on active support cases and customer interaction, **up to 100 messages** per week during emergency or active incident situations.

Message & Data Rates

Message and data rates may apply depending on your mobile carrier and service plan.

Opt-Out

You may opt out of receiving SMS messages at any time by replying STOP.

After opting out, you may receive a one-time confirmation message, and no further messages will be sent unless you re-initiate contact.

Help

For assistance, reply HELP or contact team@daviswealthadvisors.net or call 603-836-3477