

At Carlson Financial, we respect your privacy and are committed to protecting your personal information. This SMS Privacy Policy outlines how we collect, use, and protect the information you provide through SMS communications. By opting in to receive SMS communications from Carlson Financial or its employees (collectively, "Carlson Financial"), you acknowledge and agree to the following terms.

### 1. Opt-In and Consent

By providing your phone number and verbal agreement to opt in to receive SMS communications from Carlson Financial, you give your express consent to receive text messages from us regarding products, services, account updates, and other relevant financial information. You agree that Carlson Financial may send SMS messages to the mobile phone number you provided. No mobile Opt-in data will be shared with third parties.

Your consent is not a condition for purchasing any goods or services from Carlson Financial, and you may opt out at any time.

### 2. Types of Messages

Messages from Carlson Financial are for conversational use only.

### 3. Frequency of Messages

The frequency of SMS messages you receive may vary depending on your interactions with Carlson Financial. However, we will not send excessive messages and will only communicate with you as necessary for your account or the services you have requested. While we don't limit the message our customers wish to send us, we try to provide the information requested in 7 or less messages in a business day.

### 4. Message and Data Rates

Standard message and data rates from your mobile carrier may apply to SMS communications. Carlson Financial is not responsible for any charges incurred by you through your mobile provider for sending or receiving text messages.

### 5. Opt-Out/Unsubscribe

You may opt out of receiving SMS messages at any time by replying with the word "STOP" to any text message you receive from Carlson Financial. Once we receive your request, we will stop sending you messages. Please note that you may still receive account-related notifications that are necessary to fulfill your services with Carlson Financial.

If you need assistance, you can reply with the word "HELP" for more information about your SMS preferences.

### 6. Privacy and Data Security

We take the privacy and security of your information seriously. Any personal information that you provide via SMS will be processed in accordance with our [Privacy Policy](#) and all applicable privacy laws, including the Telephone Consumer Protection Act (TCPA).

We do not share or sell your personal information to third parties without your consent, except as required by law or as necessary to provide services to you. Your mobile number will only be used for communications related to Carlson Financial and our services.

### 7. Data Retention

We will retain SMS communication data according to the recordkeeping rules and requirements for a federally registered investment adviser.

### 8. Contact Us

If you have any questions regarding this SMS Privacy Policy or would like to update your preferences, please contact us at:

Carlson Financial  
Phone: 844-Carlson  
Email: [Info@CarlsonFinancial.com](mailto:Info@CarlsonFinancial.com)

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**By opting in to receive SMS messages, you acknowledge that you have read, understood, and agreed to the terms outlined in this SMS Privacy Policy. A copy of this policy and our Privacy policy can be found on our website at [www.CarlsonFinancial.com](http://www.CarlsonFinancial.com) in the footer.**