SMS Terms & Conditions

HIGH NOTE FINANCIAL LLC | Effective November 10, 2026

1. SMS Consent Communication

By opting in to receive SMS communications from High Note Financial LLC, you consent to receive text messages from our firm at the mobile phone number you provide.

SMS consent and phone numbers collected for SMS communication purposes will not be shared with third parties or affiliates for marketing purposes.

2. Types of SMS Communications

If you have consented to receive text messages from High Note Financial LLC, you may receive appointment confirmations, reminders and scheduling updates; follow-up messages about meetings, financial planning services and client inquiries; billing inquiries and administrative account-related communications; and responses to questions you initiate.

Example: “Hello, this is High Note Financial LLC reminding you of your upcoming financial planning meeting. Please contact us if you need to reschedule. Reply STOP to opt out of SMS messages.”

SMS is intended for general business and administrative communications. Please do not send Social Security numbers, account credentials, or other sensitive financial information by text.

3. Message Frequency

Message frequency may vary depending on your interactions with High Note Financial LLC, scheduled appointments and service needs. There is no fixed number of messages you will receive.

4. Potential Fees for SMS Messaging

Message and data rates may apply depending on your mobile carrier and service plan. High Note Financial LLC does not charge an additional fee for SMS communications.

5. Opt-In Method

You may opt in by submitting an online form with an optional SMS consent selection, such as a qualifying scheduling or contact form. Consent to receive SMS messages is voluntary and is not a condition of purchasing or receiving financial planning or investment advisory services.

6. Opt-Out Method

You may opt out at any time by replying **STOP** to any SMS message from High Note Financial LLC. After opting out, you will no longer receive SMS communications through the applicable messaging program, except for a confirmation of your opt-out request.

7. Help and Support

For help, reply **HELP** to a message or contact High Note Financial LLC at **360-524-3374** or **https://www.highnotefinancial.com/**.

8. Standard Messaging Disclosures

Message and data rates may apply. Message frequency may vary. Reply **STOP** to opt out at any time or **HELP** for assistance. Please review the High Note Financial LLC Privacy Policy and these SMS Terms & Conditions on our website.

9. Changes to These Terms

High Note Financial LLC may update these SMS Terms & Conditions periodically. Updated terms will be posted on our website with a revised effective date.