

SMS Privacy Policy

Effective Date: March 4, 2025

Synergy Capital of Colorado LLC is committed to protecting your privacy. This SMS Privacy Policy explains how we collect, use, disclose, and safeguard your information when you opt in to receive SMS messages from us.

Information We Collect

When you opt in to our SMS program, we may collect the following information:

- Your phone number
- Any other information you provide to us through SMS.

How We Use Your Information

We use the information we collect to:

- Send you SMS messages related to our services, events, and updates.
- Respond to your inquiries and provide customer support.

Data Sharing

We do not sell or rent your personal information to third parties. However, we may share your information with trusted service providers, such as SMS delivery platforms.

Opt-Out of SMS Communication

You can opt out of receiving SMS messages at any time by texting "STOP" to (970) 837-3088. After opting out, you will no longer receive SMS messages, except for transactional messages related to your account.

Data Security

We use industry-standard security measures to protect your personal information. We implement appropriate technical and organizational measures to protect your information from unauthorized access, use, or disclosure.

Your Rights

You have the right to access, update, or delete your personal information by contacting us directly. If you wish to exercise these rights, please email us at tracy@synergy-colorado.com

- Opt in to receiving SMS messages from us at any time by texting “START” after receiving the first text from Synergy Capital.
- Opt out of receiving SMS messages from us at any time by replying “STOP” to any message you receive.
- For assistance when communicating with us using SMS, reply “HELP” to any message you receive or call (970)837-3088.

Changes to This Policy

We may update this SMS Privacy Policy from time to time. We will notify you of any changes by posting the new policy on our website and updating the effective date.

Contact Us

If you have any questions or concerns about this SMS Privacy Policy, please contact us at:

Synergy Capital of Colorado LLC
215 West Oak Street, Suite 1100
tracy@synergy-colorado.com
(970) 837-3088

SMS Terms & Conditions

By subscribing to our SMS communications, you agree to the following terms and conditions:

Opt-In Consent

By providing your mobile phone number and consenting to receive SMS messages, you agree to receive marketing and/or transactional messages from Synergy Capital. You may opt out at any time by texting "STOP" to (970) 837-3088.

Opt-Out Process

To opt out of receiving SMS messages, text "STOP" to (970) 837-3088. For help, text "HELP" to (970) 837-3088. You can also contact our customer support team for assistance.

Opt-In Method

You may opt in to receive SMS messages from Synergy Capital in the following ways:

- By texting "START" directly to (970) 837-3088
- By email request directly to your advisor
- Verbally, during a conversation

Opt-Out Method

You can opt out of receiving SMS messages at any time in the following ways:

- Simply reply "STOP" to any SMS message you receive.
- Call us at (970) 837-3088 to request removal from our messaging list.
- By email request directly to your advisor
- Verbally, during a conversation

Types of SMS Communications

If you have consented to receive text messages from Synergy Capital, you may receive messages related to the following:

- Appointment reminders
- Follow-up messages
- Event reminders

Example: "Hello, we are looking forward to seeing you in our office this afternoon at 2PM. Don't forget that you can park in the First National Bank lot when you arrive. Reply STOP to opt out of SMS messaging. Message and data rates may apply."

Message Frequency

Message frequency may vary depending on the type of communication. For example, you may receive up to two SMS messages per week related to your appointments.

Message and Data Rates

Standard message and data rates may apply. Please check with your mobile carrier for more details.

Data Privacy

Your phone number and other personal information will be used in accordance with our Privacy Policy. By consenting to receiving SMS messages, you acknowledge and accept the terms of our Privacy Policy.

Limitation of Liability

Synergy Capital is not responsible for any delays or failures in message delivery due to technical issues or circumstances beyond our control.

For additional information, please refer to our Privacy Policy.