

## **Spencer Tax 10DLC Compliance Website Updates**

**Proposed verbiage for Spencer Tax website updates to align with current 10DLC registration and compliance standards.**

### **1. Privacy Policy Updates**

Add the following section to your existing Privacy Policy:

**## SMS TEXT MESSAGING POLICY**

#### **### Data Collection and Usage – Need the Following:**

Spencer Tax may collect mobile phone numbers and related information from individuals who opt in to receive SMS text messages from us. This information is used solely to provide the requested text messaging services, such as appointment reminders, tax deadline notifications, and account updates.

#### **### Third-Party Sharing – Need the Following:**

Mobile information will not be shared with third parties or affiliates for marketing or promotional purposes. All the above categories exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties.

#### **### Opt-Out Instructions - Need the Following:**

If you wish to be removed from receiving future text communications from Spencer Tax, you can opt out by texting STOP, QUIT, END, CANCEL, or UNSUBSCRIBE to the number from which you received messages. After you submit your request, you will receive a confirmation message that your opt-out has been processed, and you will receive no further text messages from Spencer Tax.

#### **### Customer Support - Need the Following: Replace the insert portions with your information**

For help with our text messaging services, text HELP to the number from which you received messages or contact our customer support team at [accounting@spencer-tax.com](mailto:accounting@spencer-tax.com) or 864-439-3852.

## 2. Terms & Conditions Updates

Add the following section to your existing Terms page:

### ## SMS TEXT MESSAGING TERMS & CONDITIONS

By opting in to receive text messages from Spencer Tax, you agree to the following terms:

#### ### Types of Messages - **Need the Following:**

You will receive informational messages related to tax preparation services, including but not limited to appointment reminders, tax filing deadlines, document requests, and account notifications.

#### ### Message Frequency - **Need the Following:**

Message frequency varies based on your account activity and preferences. You may receive approximately 1-4 messages per month during tax season and fewer messages during other times of the year.

#### ### Costs - **Need the Following:**

Message and data rates may apply. Spencer Tax does not charge for text messages, but standard message and data rates may apply based on your wireless carrier and plan.

#### ### Opt-Out Information - **Need the Following:**

You can stop receiving text messages at any time by replying STOP to any message you receive from us. After you submit your request, we will send you a confirmation message that your opt-out has been processed, and you will receive no further text messages from Spencer Tax.

#### ### Customer Care - **Need the Following: Replace the insert portions with your information**

For help or information about our text messaging services, reply HELP to any message you receive from us, email us at [accouting@spencer-tax.com](mailto:accouting@spencer-tax.com), or call us at 864-439-3852.