

Terms of Use

Last Update February 6, 2025

Welcome to go.advisorgiant.com (“Site”). These Terms of Use (“Terms”) govern your use of the Site, operated by **Advisor Giant** (“we,” “us,” or “our”). By accessing or using this Site, you agree to these Terms. If you do not agree, you must not use the Site.

1. Eligibility & User Responsibilities

You must be at least **18 years old** to use this Site.

By using the Site, you represent and warrant that:

- You are located in the United States.
- The information you provide is true, accurate, and complete.
- You are submitting your information voluntarily and with full consent.
- You have the authority to enter into this agreement.

You agree **not** to use the Site for any unlawful, fraudulent, or abusive purpose.

2. Purpose of the Site

Advisor Giant is **not** a financial advisory firm and does not provide financial, legal, tax, Medicare, or insurance advice.

This Site operates as a **lead-referral platform**. When you submit information, we may:

- Match you with **one** independent financial advisor serving your state
- Share your information with that advisor
- Allow that advisor to contact you directly

We **do not** endorse, guarantee, or control the advice or services provided by any third-party financial advisor.

3. No Financial Advice or Professional Services

All content on this Site is for **informational and marketing purposes only**.

Nothing on the Site:

- Constitutes financial advice
- Creates a fiduciary relationship
- Guarantees investment outcomes or performance
- Should be interpreted as individualized guidance

Advisor Giant is **not responsible** for decisions you make based on information received from a third-party advisor.

4. Communications Consent (TCPA)

By submitting your information, you agree that:

Advisor Giant AND the financial advisor you are matched with may contact you via:

- Manual phone calls
- Manual text messages
- Automated SMS messages
- Autodialed or automated phone calls
- Prerecorded or artificial voice messages
- Email messages

These communications may include marketing messages.

Consent is not required to purchase any goods or services.

Message & data rates may apply.

You may opt out at any time.

5. Use of Third-Party Services & Tools

To operate the Site, process leads, and improve performance, we use third-party tools, including:

- **Microsoft Clarity** (anonymous behavioral analytics + session replays)
- **HubSpot CRM** (lead storage only; no HubSpot tracking scripts)

- **TrustedForm** (lead certification; metadata only)
- **Meta/Facebook Pixel** (advertising optimization, hashed audience uploads)

By using the Site, you acknowledge that:

- These third parties may collect, process, or store certain technical data
 - We are **not responsible** for the privacy practices or terms of these providers
 - You should review their respective Terms and Privacy Policies as applicable
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6. Relationship with Third-Party Advisors

When we share your information with an approved advisor, that advisor:

- Operates independently from Advisor Giant
- Maintains their **own privacy policy, data retention schedule, and communication practices**
- May store and use your information for their **own marketing campaigns**
- Is solely responsible for the financial advice or information they provide

Advisor Giant is **not** responsible for:

- The accuracy of advice provided by advisors
- The conduct, performance, or actions of advisors
- Any services rendered after the referral is made
- Outcome of financial guidance or recommendations

We do **not** control third-party advisors and do **not** guarantee any results.

7. Intellectual Property

All content, branding, design, text, graphics, logos, and functionality on this Site belong to Advisor Giant and are protected by United States intellectual property laws.

You may **not** copy, reproduce, distribute, or modify any content without our written consent.

8. Prohibited Activities

You agree not to:

- Interfere with Site operations
- Attempt unauthorized access to the Site or systems
- Use the Site to harvest, scrape, or collect data unlawfully
- Submit fraudulent or inaccurate information
- Engage in any activity that harms the Site or its users

We may terminate or restrict access for any misuse.

9. Disclaimers

The Site is provided “AS IS” and “AS AVAILABLE.”

We disclaim all warranties, express or implied, including but not limited to:

- Accuracy, reliability, or completeness of information
- Fitness for a particular purpose
- Guarantees regarding outcomes from referred advisors
- Errors, interruptions, or technical issues

We do not guarantee that:

- Any advisor will contact you
 - Any financial outcome will be achieved
 - The Site will be uninterrupted or error-free
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10. Limitation of Liability

To the fullest extent permitted by law:

Advisor Giant is **not liable** for:

- Any indirect, incidental, consequential, or punitive damages
- Loss of profits, data, or business

- Damages resulting from reliance on third-party advisors
- Errors or issues caused by third-party tools, technology providers, or partners
- Any communication made by the advisor you are matched with

Our total liability to you will not exceed **\$100** or the amount you paid to use the Site (whichever is less).

11. Indemnification

You agree to indemnify and hold Advisor Giant harmless against any claims, losses, damages, liabilities, or expenses arising from:

- Your use of the Site
 - Your submission of information
 - Communications with third-party advisors
 - Your violation of these Terms
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12. Governing Law

These Terms are governed by the laws of the **State of Delaware**, without regard to conflict-of-law principles.

Any disputes must be resolved in **Delaware state or federal courts**, and you consent to jurisdiction there.

13. Changes to Terms

We may update or modify these Terms at any time.

Revisions will be posted with a new “Last Updated” date.

Your continued use of the Site means you accept the updated Terms.

14. Contact Us

For any questions about these Terms:

Email: privacy@advisorgiant.com

Mailing Address:

Advisor Giant
1461 Lawrence Dr #2
Thousand Oaks, CA 91362