

Planly Inc. Services Reservation Terms & Conditions

1. Planly Inc. ("Planly") Services Reservation

Thank you for placing a Reservation for Planly's financial planning services (the "Services"). By making your Reservation, you have secured the approximate priority for the right, but not the obligation, to engage Planly's Services.

2. Effective Date

Your Reservation becomes effective when (1) you place your Reservation and (2) we receive your Reservation Payment.

3. Process

While this Reservation secures the price and approximate priority, it does not constitute the purchase of services or investment advice from Planly. We will contact you when Planly has availability to engage with new clients at which time you will receive the applicable advisory agreement to engage Planly's Services. If you elect to proceed with engaging Planly and become a client of Planly, we will apply your Reservation Payment towards the price of the Services. Until you enter into an advisory agreement with Planly, your Reservation may be cancelled by you or by Planly, at any time, in which case you will receive a full refund of your Reservation Payment.

4. Acknowledgements; Non-Transferable

You understand that we will not hold your Reservation Payment separately or in an escrow or trust fund or pay any interest on your Reservation Payment. Your Reservation is not transferable or assignable to another party without the prior written approval of Planly.

5. Your Details

From time to time we will ask you to provide information so that we can perform our obligations under these terms and conditions. We will maintain your personal information in accordance with our Privacy Policy, which is available at <https://www.getplanly.com>.