

SMS Communications and Text Messaging Policy

Effective Date: 08/31/2026

LaMountain, Riccardelli & Petkovich Accounting, Inc (“we,” “us,” or “our”) may offer clients and customers the option to receive text messages (SMS) regarding accounting, bookkeeping, tax preparation, payroll, billing, appointments, client requests, and other services for which they have provided consent.

1. SMS Consent and How We Collect, Use, and Share Information

When you voluntarily provide your mobile phone number and affirmatively consent to receive SMS messages from LaMountain, Riccardelli & Petkovich Accounting, Inc, we may collect and retain your mobile phone number, SMS consent information, the date and method of your consent, and information necessary to manage your messaging preferences.

SMS consent may be collected through an online form, paper form, verbally during a conversation with an authorized employee, or through another method where you are clearly informed that you are consenting to receive SMS messages.

We use your mobile phone number and SMS consent information to communicate with you regarding the accounting and business services you have requested or authorized. These communications may include appointment reminders, requests for tax or accounting documents, bookkeeping follow-ups, billing notifications, responses to inquiries, and other client-service communications.

LaMountain, Riccardelli & Petkovich Accounting, Inc does not sell, rent, or share your mobile phone number or SMS consent with third parties or affiliates for their own marketing purposes or for the purpose of allowing those parties to send you SMS messages.

We may disclose information to service providers that assist us with accounting, communications, technology, scheduling, or other business operations, when necessary to provide our services. We may also disclose information when required by law, legal process, regulation, or governmental authority.

We do not use purchased lists or third party-generated lead lists for SMS communications.

2. Types of SMS Communications

If you have provided consent to receive SMS messages from LaMountain, Riccardelli & Petkovich Accounting, Inc, you may receive text messages related to:

- Tax preparation and tax document requests
- Bookkeeping services and document follow-ups
- Payroll-related communications
- Accounting appointments and reminders
- Billing and invoice notifications
- Follow-up messages regarding client requests
- Responses to client questions or inquiries
- Accounting or bookkeeping service updates
- Other informational or transactional communications for which you have provided consent

Marketing or promotional SMS messages, if offered, will only be sent where the required consent has been obtained.

Examples of messages may include:

“Hi [Client Name], this is LaMountain, Riccardelli & Petkovich Accounting, Inc. We are following up regarding your tax documents for the upcoming filing deadline. Please submit any outstanding documents through your secure client portal or contact our office. Reply STOP to opt out.”

“Hi [Client Name], this is LaMountain, Riccardelli & Petkovich Accounting, Inc. Your accounting appointment is confirmed for [Date] at [Time]. Please reply if you need to reschedule. Reply STOP to opt out.”

“Hi [Client Name], this is LaMountain, Riccardelli & Petkovich Accounting, Inc. We are missing several documents needed to complete your bookkeeping for [Month]. Please contact our office or upload the documents through your secure client portal. Reply STOP to opt out.”

“Hi [Client Name], this is LaMountain, Riccardelli & Petkovich Accounting, Inc. Your invoice for accounting services in the amount of \$[Amount] is due on [Date]. Please contact us if you have any questions. Reply STOP to opt out.”

“Hi [Client Name], this is LaMountain, Riccardelli & Petkovich Accounting, Inc. We are following up regarding your recent accounting or tax service request. Please reply to this message if you need assistance. Reply STOP to opt out.”

3. Message Frequency

Message frequency may vary depending on the type of communication and your interaction with LaMountain, Riccardelli & Petkovich Accounting, Inc.

You may receive up to **five (5) SMS messages per week** regarding tax preparation, bookkeeping, accounting services, billing, appointments, document requests, or other authorized client communications. Actual message frequency may vary based on your account, service needs, deadlines, and communications with us.

Message frequency may vary.

4. Potential Fees for SMS Messaging

Message and data rates may apply depending on your wireless carrier and mobile service plan. These charges are your responsibility and may vary depending on your carrier and plan.

5. How to Opt In

You may opt in to receive SMS messages from LaMountain, Riccardelli & Petkovich Accounting, Inc through one or more of the following methods:

- By voluntarily selecting an SMS consent checkbox on an online form;
- By completing a paper form containing SMS consent language;
- By providing express verbal consent during a conversation with an authorized employee; or
- By otherwise affirmatively requesting to receive SMS messages from LaMountain, Riccardelli & Petkovich Accounting, Inc.

When SMS consent is collected through a web form, the SMS consent checkbox will be optional and will not be pre-checked.

SMS consent will be recorded and maintained by LaMountain, Riccardelli & Petkovich Accounting, Inc as appropriate.

Consent to receive SMS messages is not a condition of purchasing any goods or services.

6. How to Opt Out

You may opt out of receiving SMS messages at any time by replying **STOP** to any text message from LaMountain, Riccardelli & Petkovich Accounting, Inc.

After you send STOP, you will no longer receive SMS messages from that messaging program unless you subsequently provide valid consent to receive messages again.

You may also contact LaMountain, Riccardelli & Petkovich Accounting, Inc directly at **518 643 5129** to request removal from SMS communications.

7. Help

For assistance with SMS communications, reply **HELP** to any text message from LaMountain, Riccardelli & Petkovich Accounting, Inc.

You may also contact us directly at **518 643 5129** or visit: www.lamricaccounting.com

8. Standard SMS Disclosures

If you consent to receive SMS from LaMountain, Riccardelli & Petkovich Accounting, Inc, you agree to receive **informational, transactional, accounting, bookkeeping, tax preparation, billing, appointment, follow-up, and other service-related SMS messages** from us.

Reply STOP to opt out; reply HELP for support; message and data rates may apply; messaging frequency may vary.

For more information, please review this Privacy Policy and our Terms and Conditions.

9. SMS Consent Is Not Shared

LaMountain, Riccardelli & Petkovich Accounting, Inc does not sell, rent, or share your mobile phone number or SMS consent with third parties or affiliates for their own marketing purposes or for the purpose of allowing them to send you SMS messages.

Your SMS consent is used solely for the purposes described in this Privacy Policy and in connection with the communications for which you have provided consent, subject to applicable law.

10. SMS Consent on Our Website

Where LaMountain, Riccardelli & Petkovich Accounting, Inc collects SMS consent through a website form, the SMS consent option will be presented separately from other consent options. The SMS consent checkbox will be optional and unchecked by default.

Example consent language:

“I consent to receive informational and service-related SMS messages from LaMountain, Riccardelli & Petkovich Accounting, Inc, including appointment

reminders, tax and accounting document requests, bookkeeping follow-ups, billing notifications, and responses to my inquiries. Reply STOP to opt out; reply HELP for support; message and data rates may apply; messaging frequency may vary. Consent is not a condition of purchasing any goods or services. See our Privacy Policy and Terms and Conditions for additional information.”

11. Contact Us

If you have questions about this SMS policy or your messaging preferences, please contact LaMountain, Riccardelli & Petkovich Accounting, Inc at:

Phone: 518-643-5129

Website: www.lamricaccounting.com

Privacy Policy: [Insert Privacy Policy URL]

LaMountain, Riccardelli & Petkovich Accounting, Inc may update this SMS policy from time to time to reflect changes in our services, applicable law, or SMS messaging requirements.