Domain Money Satisfaction Guarantee Terms & Conditions

Effective Date: September 18th, 2026

Domain Money is committed to your satisfaction. This Satisfaction Guarantee applies to all plans and memberships purchased and delivered by Domain Money ("Service(s)"). By purchasing a Service and accepting these Terms & Conditions, you agree to be bound by them.

1. Domain Money Plan Satisfaction

Eligibility:

- This Satisfaction Guarantee is only applicable to paid plans purchased directly from Domain Money.
    - This Guarantee applies to your initial Plan delivered at the start of your engagement with Domain Money. It does not apply to Plan updates delivered as part of an annual Membership renewal.
- Free plans, consultations, and other paid or unpaid services such as tax filing, estate planning, AltruistOne fees, or other services provided by third-party partners not explicitly labeled as "Plans" are not covered by this guarantee.
- You must have received the delivered Plan before initiating a Guarantee claim.
- Unsatisfied claims must be made in good faith and with reasonable justification, Domain Money withholds the right to reject any claim which it finds baseless.

Guarantee Details:

- If you are not satisfied with your delivered Plan, you must explicitly state so within your plan presentation or delivery session and verbally state you wish to make a satisfaction guarantee claim. Verbal claims must be followed up in writing within 24 hours to support@domainmoney.com.
- Once a verbal unsatisfied claim has been made during the delivery session the client has 24 hours to provide written revision requests, this should be sent with the written claim to support@domainmoney.com.
- Revision requests must be submitted through our official support channels and clearly outline your concerns with the delivered Plan.
- Domain Money will work diligently to provide a revised Plan that addresses your concerns and meets your expectations.

- Domain Money's obligation under this Guarantee is satisfied upon delivery of the revised Plan. If you decline to receive or engage with the revised Plan, this Guarantee is deemed fulfilled and no further action is owed.

2. Domain Money Annual Membership Satisfaction

When your membership automatically renews to an annual Domain Money Membership, you will be entitled to a risk-free trial period of 7 days. If, within those initial 7 days, you are dissatisfied with the service, you may request a full refund. You must submit a request through our official support channels within 7 days to get the full refund. Domain Money reserves the right to deduct the value of any cash incentives, promotional deposits, or other monetary benefits you received from Domain Money since the start of the relationship from the refund amount. The refund will be issued using the same payment method employed for the subscription. Processing times for refunds may vary depending on your financial institution.

Following the initial 7-day trial period, cancellations will not be eligible for a refund. However, you will retain access to the service for the remaining duration of the current billing period.

4. Exclusions

- This Guarantee does not apply to:
  - Delays or issues caused by factors outside of Domain Money's control (e.g. third-party service outages or delays).
  - Your decision to not use any parts of the Domain Membership (e.g., tax filing, estate planning, investment management)
  - Changes in your requirements or expectations after the Plan has been delivered.
  - Issues with finding availability on advisors calendar as long as there are several available scheduling slots within normal business hours on a rolling 60 days basis.
  - Issues resulting from your failure to provide necessary information or follow instructions.
  - Use of the Plan or Domain Money Membership for illegal or unethical purposes.
- Grounds for a Claim: Examples of concerns that may support an unsatisfied Plan claim include, but are not limited to:
  - Investment recommendations that don't reflect the risk tolerance, goals, or time horizon you provided
  - Factual, data, or calculation errors in the Plan
  - Information you provided before delivery that isn't reflected in the Plan

    - A stated financial goal that the Plan doesn't address

5. General

- Domain Money reserves the right to modify or discontinue this Guarantee at any time without prior notice.
- This Guarantee is governed by the laws of your jurisdiction and constitutes the entire agreement between you and Domain Money regarding this Guarantee.
- If any provision of this Guarantee is held to be invalid or unenforceable, such provision shall be struck and the remaining provisions shall remain in full force and effect.
- If you have any questions about this Satisfaction Guarantee, please contact us through your CFP® professional or reach out to support@domainmoney.com.