

# Membership Conditions & Regulations

October 15, 2022

In these Membership Conditions and Regulations, the name “Advisorly” is used to represent 1096486 BC Ltd (Advisorly) and its affiliated companies including, but not limited to, “Elements Cremation, Pre-Planning, & Burial ” and “House Calls Health & Wellness”. By being a member of Advisorly, you agree to comply with the conditions and regulations below. Advisorly may revise the following conditions and regulations without consent of the member, however, members will be given 30 days notice via email regarding the changes to our conditions and regulations.

## Membership Qualifications and Guidelines

- Memberships are available only for Residents of British Columbia ages 18 or older.
- At any time, an applicant may be refused membership or have its membership revoked at Advisorly’s discretion.
- Advisorly reserves the right to confirm employment.
- Membership Owners and the immediate family of Membership Owners are bound by any and all rules including, but not limited to, these conditions and regulations in addition to our privacy policies and practices.
- At the time when services are provided, Advisorly reserves the right to request a Canadian government-issued ID with a British Columbia address.
- The Membership Owner is defined as the individual who initially registers for the Advisorly membership.
- Limit of one Membership per person.

## Immediate Family

- For the purposes of the Advisorly Membership Program, Advisorly recognizes the spouse/partner, children, parents, grandchildren or grandparents of the Membership Owner as immediate family.
- The immediate family of the Membership Owner must be a Resident of British Columbia to be included in the Membership Program.
- The Membership Owner is responsible for declaring their immediate family members upon enrolment.

- The immediate family of the membership family may not be altered or changed, unless divorce or addition of children occurs.
- The children and grandchildren of the Membership Owner must be under 19 years of age to receive membership coverage.

## **Advisorly's Membership Fees**

- For memberships with auto annual renewals, the membership is effective from the date of initial membership payment to its anniversary date 12 months later.
- For memberships with auto monthly renewals, the membership is effective from the date of initial membership payment to its anniversary date the following month.
- If a Membership owner fails to renew their membership or update their method of payment within 30 days from the date of membership expiration, their membership will be terminated.
- Memberships are not transferable.
- The Membership Owner is accountable for the membership and those included in the membership.
- When a membership is terminated, the membership owner and the immediate family will no longer be entitled to the benefits of the Advisorly membership program.
- The Advisorly general public membership fee is \$9.99 (plus applicable taxes) for a monthly renewal membership or \$99.99 (plus applicable taxes) for an annual renewal membership.
- The Advisorly group rate membership fee is \$7.99 (plus applicable taxes) for a monthly renewal membership or \$79.99 (plus applicable taxes) for an annual renewal membership, with a valid benefit code.
- When utilizing Membership benefits, only one Membership may be used at a time.

## **Renewing an Advisorly Membership**

- Advisorly only offers auto renewal payment options. The Membership Owner is responsible to update payment information. Membership Owners may update their payment information at [advisorly.ca](http://advisorly.ca) or by phoning Advisorly at 604-510-5155.

- For memberships with auto annual renewals, renewal fees are due on the anniversary date of the initial payment completed by the Membership owner.
- For memberships with monthly renewals, renewal fees are due monthly on the anniversary date from the initial payment completed by the Membership owner.
- The Membership Owner is responsible for ensuring all personal and payment information is up to date.

## **Discount**

- For the general public, the Membership discount is calculated as follows:
  1. On products and services at the time of use or those who purchase Pre-need, 10% off the total cost of the products and services Advisorly offers, not including third-party expenses, including taxes.
- For Memberships through organizations, the discount is calculated as follows:
  1. For Membership Owner: On products and services at the time of use or those purchased Pre-need, 10% off the total cost of the products and services Advisorly offers, not including third-party expenses and taxes.
  2. For the Immediate Family of the Membership Owner: On products and services at the time of use or those purchased Pre-need, 10% off the total cost of the products and services Advisorly offers, not including third-party expenses and taxes.
- The following are not Eligible Services and not approved for any discount:
  1. Government Fees;
  2. Disbursements or expenses paid or payable by Advisorly to a third party (including any subcontractor required to provide services and/or when an Eligible Participant cannot be serviced by an Advisorly office); and
  3. Taxes
- No discounts or benefits will be applied to any sale for any person unless they are a Membership Owner or the immediate family of the Membership Owner.

## **Cancellations and Refunds**

- Advisorly can cancel your membership at any time if you are dissatisfied.
- Advisorly provides a full refund if you are dissatisfied with your membership within a 30-day grace period from the initial date of enrollment. In the event Advisorly's services are used, the 30-day grace period is forfeited.

- Advisorly does not offer refunds outside of its 30-day grace period from the initial date of enrollment on our membership fees.

## **Payment**

- Membership payments must be made by a valid credit card accepted by Advisorly.
- By paying the Membership Fees with a credit card, Advisorly is authorized to obtain your personal information regarding your credit card and its issuer.

## **Taxation**

- In agreement with Provincial and Federal law, the applicable sales tax (GST, HST, QST or PST) will be charged to all transactions.

## **Other**

- Advisorly reserves the right to increase prices and membership fees.
- Advisorly reserves the right to add or change the services that it offers.
- Advisorly may in the future enforce restrictions or make changes to its policy at any time.
- Advisorly cannot be held liable for any lost, stolen or damaged items of personal property.
- Through the Advisorly membership program, Advisorly is authorized to obtain profit and reach terms on discounts or rebates with other organizations/companies.