

Refund Policy for SREI Legacy Conference

1. Refund Periods:

- Fully Refundable Until January 1: Registrants who cancel their registration for the Legacy Conference before January 1, are eligible for a full refund of the registration fee, with no service fee.
- From January 1 to April 30: Registrants who cancel their registration between January 1 and April 30 are eligible for a refund of the registration fee, subject to a \$50 service fee.
- From May 1 to July 31: Registrants who cancel their registration between May 1 and July 31 are eligible for a refund of the registration fee, subject to a \$150 service fee.
- As of August 1,: No refunds will be issued for cancellations made on or after August 1.

2. Refund Request Procedure:

- To request a refund, registrants must submit a written request to SREI Legacy Conference organizers by email at refunds@seniorsrealestateinstitute.com.
- The refund request must include the registrant's name, contact information, and proof of registration.

3. Refund Processing:

- Refunds will be processed within 30 business days of receiving a valid refund request.
- Refunds will be issued using the same payment method used for the original registration, when possible.

4. Exceptional Circumstances:

- In cases of exceptional circumstances, such as personal medical emergencies or unforeseen catastrophic events, Legacy Conference organizers may consider refund requests outside the specified refund periods. Such requests will be evaluated on a case-by-case basis, and a decision will be made at the discretion of the organizers.

5. Transfer of Registration:

- Registrants who are unable to attend the Legacy Conference but wish to transfer their registration to another individual may do so without incurring a service fee.

Requests for registration transfers must be made in writing and submitted to refunds@seniorsrealestateinstitute.com.

6. Force Majeure:

- In the event that SREI Legacy Conference is canceled, postponed, or rescheduled due to unforeseen circumstances or Force Majeure events, registrants will be provided with the option to either transfer their registration to the rescheduled event or receive a full refund, including service fees.

7. Contact Information:

– For refund requests, questions, or additional information related to this refund policy, please contact us at:

SREI, LLP

2932 NW 122nd Ste 17

Oklahoma City, OK 73120

512-842-6011

refunds@seniorsrealestateinstitute.com

8. Intellectual Property Rights: All materials, presentations, and content provided during the event are the intellectual property of SREI or its respective owners. Attendees agree not to reproduce, distribute, or share any such materials without prior written consent.

9. Code of Conduct: Attendees are expected to conduct themselves in a professional and respectful manner throughout the duration of the event. Any behavior deemed disruptive or inappropriate by SREI staff may result in removal from the event without refund.

10. Liability Waiver: SREI and its affiliates shall not be held liable for any loss, damage, injury, or inconvenience sustained by attendees during the event. Attendees participate at their own risk and are responsible for their own safety and well-being.

11. Cancellation by SREI: In the unlikely event that SREI cancels the event for any reason, attendees will be notified promptly, and refunds may be issued at the discretion of SREI.

By registering for the Legacy Conference, attendees acknowledge that they have read, understood, and agreed to the terms and conditions of this refund policy.

Refund Policy for Prepaid 1-on-1 Coaching

1. Prepaid Coaching Period (6 month pre-paid coaching):

– Clients purchasing prepaid 1-on-1 coaching services are entitled to use coaching sessions included in their package within a 9-month period from the date of purchase.

2. Refund Period:

– Clients have a 15-day refund period from the date of purchase during which they may request a full refund of the prepaid coaching fee less any fees related to coaching sessions already completed (\$350 per session).

3. Refund Request Procedure:

– To request a refund within the 15-day period, clients must submit a written refund request to SREI, LLP. via email at refunds@seniorsrealestateinstitute.com.

– The refund request must include the client's name, contact information, reason for cancellation, and proof of payment.

4. Refund Processing:

– Refunds for prepaid coaching services will be processed within 15 business days of receiving a valid refund request.

– Refunds will be issued using the same payment method used for the original purchase, when possible.

5. Cancellation After 30 Days:

– After the initial 15-day period, no refunds will be issued for prepaid coaching services.

6. Rescheduling and Session Expiry:

– Clients may reschedule coaching sessions within the 9-month prepaid period by contacting their coach directly.

– Any unused coaching sessions after the 9-month period will expire and are non-refundable.

7. Exceptional Circumstances:

– In cases of exceptional circumstances, such as medical emergencies or unforeseen events that prevent the client from utilizing the prepaid coaching, the coaching service provider may consider refund requests outside the specified refund period. Such requests will be evaluated on a case-by-case basis, and a decision will be made at the discretion of the coaching service provider.

8. Contact Information:

– For refund requests, questions, or additional information related to this refund policy, please contact us at:

SREI, LLP.

2932 NW 122nd Ste 17

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By purchasing prepaid 1-on-1 coaching services, clients acknowledge that they have read, understood, and agreed to the terms and conditions of this refund policy.

Refund Policy for Group Coaching Programs

Group Coaching programs are only refundable when canceling request is completed prior to the program commencing. Once a program has commenced the program is non-refundable.

1. Non-Refundable Commitment:

- Group coaching program participants agree to a specified term commitment, as outlined in the program details, upon enrollment.
- The term commitment for the group coaching program is non-refundable.

2. Program Description:

- The group coaching programs may include live, virtual, recorded, or online engagement with SREI coaches and peer group members.
- Participants are encouraged to review the program details and content prior to enrollment to ensure they align with their goals and expectations.

3. Cancellation or Termination:

- Participants may not cancel or terminate their commitment to the group coaching program before the specified term is completed.
- Participants are responsible for fulfilling the full commitment term as agreed upon at enrollment.

4. Exceptions:

- In exceptional circumstances, such as medical emergencies or unforeseen events, that prevent a participant from continuing in the program, SREI may consider requests for program deferral or credit towards future programs. Such requests will be evaluated on a case-by-case basis, and a decision will be made at the discretion of the coaching service provider.

5. Participant Responsibilities:

- Participants are responsible for attending scheduled coaching sessions, completing assigned tasks, and actively participating in the program to maximize their benefits.
- Failure to attend sessions or actively engage in the program does not warrant a refund or cancellation of the commitment.

6. Transfer of Commitment:

- The commitment to the group coaching program is non-transferable and cannot be transferred to another individual.

7. Contact Information:

- For questions or additional information related to this return policy, please contact us at:

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8. Intellectual Property Rights: All materials, presentations, and content provided during the event are the intellectual property of SREI or its respective owners. Attendees agree not to reproduce, distribute, or share any such materials without prior written consent.

9. Code of Conduct: Attendees are expected to conduct themselves in a professional and respectful manner throughout the duration of the event. Any behavior deemed disruptive or inappropriate by SREI staff may result in removal from the event without refund.

10. Liability Waiver: SREI and its affiliates shall not be held liable for any loss, damage, injury, or inconvenience sustained by attendees during the event. Attendees participate at their own risk and are responsible for their own safety and well-being.

11. Cancellation by SREI: In the unlikely event that SREI cancels the event for any reason, attendees will be notified promptly, and refunds may be issued at the discretion of SREI.

By enrolling in SREI group coaching programs, participants acknowledge that they have read, understood, and agreed to the terms and conditions of this return policy.

Special and Invitation Only Events

By registering for a Special and Invitation Only event hosted by SREI, you agree to the following terms and conditions:

1. **Non-Refundable Policy:** All purchases for Special and Invitation Only events are non-refundable. This policy applies regardless of the reason for cancellation or non-attendance.
2. **Commitment to Attendance:** By registering for the event, you acknowledge your commitment to attending and actively participating in the entirety of the scheduled program.
3. **Transfer of Registration:** In the event that you are unable to attend, you may transfer your registration to another individual within your organization with the approval of SREI. You must make this request to SREI in writing at least 7 days prior to the event date.
4. **Event Modifications:** SREI reserves the right to make changes to the event schedule, program content, speakers, venue, or any other aspect of the event as deemed necessary. Attendees will be notified promptly of any such changes.
5. **Intellectual Property Rights:** All materials, presentations, and content provided during the event are the intellectual property of SREI or its respective owners. Attendees agree not to reproduce, distribute, or share any such materials without prior written consent.
6. **Code of Conduct:** Attendees are expected to conduct themselves in a professional and respectful manner throughout the duration of the event. Any behavior deemed disruptive or inappropriate by SREI staff may result in removal from the event without refund.
7. **Liability Waiver:** SREI and its affiliates shall not be held liable for any loss, damage, injury, or inconvenience sustained by attendees during the event. Attendees participate at their own risk and are responsible for their own safety and well-being.
8. **Cancellation by SREI:** In the unlikely event that SREI cancels the event for any reason, attendees will be notified promptly, and refunds may be issued at the discretion of SREI.

By registering for Special or Invitation Only events, attendees acknowledge that they have read, understood, and agreed to the terms and conditions of this refund policy.

Cancellation Policy for Live Course (in-person or remote)

1. Cancellation Fee:

– Students canceling a live course registration up to 10 days after registration and no later than 3 days prior to the start date may request a refund less a \$50 service fee.

2. Cancellation Request Procedure:

– To request a cancellation and initiate the refund process, registrants must submit a written cancellation request to SREI, LLP. via email at refunds@seniorsrealestateinstitute.com.

– The cancellation request must include the registrant's name, contact information, course details, and proof of registration.

3. Refund Processing:

– Refunds, minus the \$50 service fee, for cancellations will be processed within 15 business days of receiving a valid cancellation request.

– Refunds will be issued using the same payment method used for the original registration, when possible.

4. Exceptions:

– In exceptional circumstances, such as personal medical emergencies or unforeseen catastrophic events that prevent a student from attending the course, the course provider may consider requests for program deferral or credit towards future courses. Such requests will be evaluated on a case-by-case basis, and a decision will be made at the discretion of the course provider.

5. Participant Responsibilities:

– Participants are responsible for notifying the course provider of their cancellation in a timely manner and providing all necessary information to process the cancellation and refund.

6. Contact Information:

– For cancellation requests, questions, or additional information related to this cancellation policy, please contact us at:

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7. Intellectual Property Rights: All materials, presentations, and content provided during the event are the intellectual property of SREI or its respective owners. Attendees agree not to reproduce, distribute, or share any such materials without prior written consent.

8. Code of Conduct: Attendees are expected to conduct themselves in a professional and respectful manner throughout the duration of the event. Any behavior deemed

disruptive or inappropriate by SREI staff may result in removal from the event without refund.

9. Liability Waiver: SREI and its affiliates shall not be held liable for any loss, damage, injury, or inconvenience sustained by attendees during the event. Attendees participate at their own risk and are responsible for their own safety and well-being.

10. Cancellation by SREI: In the unlikely event that SREI cancels the event for any reason, attendees will be notified promptly, and refunds may be issued at the discretion of SREI.

Those registering for the live courses with SREI acknowledge they have read, understand, and agreed to the terms and conditions of this cancellation policy.

SREI M3 Club Terms of Service Addendum

The following terms apply specifically to the purchase and participation in the SREI M3 Club program and are in addition to the general Terms of Service found at <https://seniorsrealestateinstitute.com/terms-of-service>.

1. Subscription Commitment

Enrollment in the SREI M3 Club requires a one (1) year minimum subscription commitment.

Subscriptions will automatically renew annually unless canceled in accordance with the cancellation terms outlined in these Terms of Service.

2. Course Access Requirement

Membership in the SREI M3 Club is only available to individuals who are current, licensed owners of the Success in Seniors Real Estate™ (SSRE) course.

If at any point membership eligibility lapses due to non-ownership of the SSRE course, the SREI M3 Club subscription may be suspended or terminated without refund.

3. Ongoing Access to SSRE Course

Active M3 Club members will retain continued access to the Success in Seniors Real Estate™ course for the duration of their membership.

Access is contingent on maintaining an active and current M3 Club subscription.

4. Licensing of Presentation Systems

With an active M3 Club subscription, members are granted a non-transferable, non-exclusive license to use the following proprietary SREI presentation systems:

Downsizing Made Easy® Presentation System

Moving Mom & Dad® Presentation System

Licenses remain valid only during the term of the active M3 Club subscription.

Upon cancellation, non-renewal, or termination of the subscription, all rights to use these presentation systems will immediately cease.

5. Payment Terms

Members agree to pay the annual subscription fee in full or by installment as offered at the time of purchase.

Subscription fees are non-refundable, except as otherwise required by applicable law.

6. Cancellation & Termination

Cancellations may only be made effective at the end of the one-year subscription term. Early cancellations will not result in a refund or proration.

SREI reserves the right to terminate an M3 Club subscription at any time if a member is found to be in violation of these Terms of Service, the SSRE licensing agreement, or any applicable laws.

No Return Policy for Digitally Downloadable Products

1. No refunds will be issued on digitally downloadable products.
 - Due to the nature of digital downloads, we do not accept returns or offer refunds for any digitally downloaded products once they have been purchased.
2. By completing a purchase of our digitally downloaded products, you acknowledge and agree to the terms of this no return policy.

If you have any questions or concerns about our no return policy for digitally downloaded products, please do not hesitate to contact us prior to purchasing using the provided contact information.

Contact Information:

– For questions or additional information related to this return policy, please contact us at:

SREI, LLP.

2932 NW 122nd Ste 17

Oklahoma City, OK 73120

512-842-6011

info@seniorsrealestateinstitute.com

By purchasing products from SREI, customers acknowledge that they have read, understood, and agreed to the terms and conditions of this return policy.

Success in Senior Real Estate Course:

The Success in Senior Real Estate course is only available for 1 year from the date of purchase unless you have completed the program, applied for your CSHP, and are current with dues on your CSHP.

Right to Refuse Service or Participation

The Seniors Real Estate Institute (SREI) reserves the right, at its sole discretion, to **refuse service, deny participation, or revoke access** to any of its products, programs, courses, memberships, or events—whether in-person or virtual—at any time and for any reason.

This right may be exercised, without limitation, in cases where an individual's conduct or business activity is deemed to be:

- Disruptive, disrespectful, or inconsistent with the mission and values of SREI;
- In violation of SREI's Terms of Service, Code of Conduct, or other published policies;
- Detrimental to the learning environment, community culture, or experience of other participants;
- In conflict with legal, ethical, or professional standards of practice; or
- Competitive in nature, including individuals or organizations that develop, market, or promote products, services, or training programs that are similar to or in competition with those offered by SREI.

SREI may, at its discretion, restrict or revoke access to courses, memberships, or live events (including online meetings and private communities) without refund or credit in such cases.

Participation in any SREI program or event constitutes acknowledgment and acceptance of this policy.