



Subscription Terms and Conditions

May 1st, 2026

These Terms & Conditions (“Terms”) govern Finvest’s Finn Pro subscription plan (“Finn Pro,” “Subscription,” “Offer,” or “Plan”). By starting a free trial, purchasing a subscription, or continuing to use Finn Pro, you agree to these Terms in addition to all other Finvest agreements applicable to your account(s), including the Finvest Client Agreement, general Terms of Service, Privacy Policy, and any applicable advisory or brokerage agreements. Finvest may modify, suspend, or terminate Finn Pro or these Terms at any time in accordance with applicable law.

1. Overview

Finn Pro is a paid subscription plan that gives eligible users access to premium features, tools, insights, and functionality offered by Finvest. Finn Pro may include features such as advanced financial insights, AI-powered analysis, portfolio tools, account analytics, market data, personalized experiences, alerts, reports, and other premium functionality made available by Finvest from time to time.

Finn Pro is offered as either a monthly subscription or an annual subscription. Finvest may also offer promotional pricing, including launch offers, limited-time discounts, or free trial periods. Finn Pro does not constitute legal, tax, accounting, or investment advice unless expressly stated in a separate written agreement with Finvest. Any information provided through Finn Pro is for informational and educational purposes only and should not be relied upon as the sole basis for financial, investment, tax, legal, or other important decisions.

2. Subscription Plans

Monthly Plan

The Finn Pro monthly plan is billed at **\$20 per month**, unless otherwise stated at checkout. Monthly subscriptions automatically renew each month unless canceled before the next billing date.

Annual Plan

The Finn Pro annual plan is billed at **\$200 per year**, unless otherwise stated at checkout. Annual subscriptions automatically renew each year unless canceled before the next renewal date.

Promotional or Launch Pricing

From time to time, Finvest may offer promotional pricing, including a launch offer such as **\$99 for the first year** of Finn Pro.

Unless otherwise stated at checkout, promotional pricing applies only to the initial subscription period. After the promotional period ends, your subscription will automatically renew at the then-current standard price for your selected plan.

For example, if you purchase a \$99 first-year launch offer for the annual plan, your subscription will renew at **\$200 per year** unless you cancel before renewal.

Promotional offers may be limited by time, availability, eligibility, geography, account status, or other conditions determined by Finvest. Finvest may modify, extend, suspend, or terminate promotional offers at any time.

3. 7-Day Free Trial

Finn Pro may include a **7-day free trial** for eligible users. To start a free trial, you may be required to select a subscription plan and provide a valid payment method.

You will not be charged during the free trial period. Unless you cancel before the free trial ends, your selected subscription plan will automatically begin at the end of the trial, and your payment method will be charged for the applicable subscription fee.

If you select the monthly plan, you will be charged the monthly subscription fee at the end of the trial. If you select the annual plan, you will be charged the annual subscription fee at the end of the trial.

If you select an eligible promotional annual offer, you will be charged the promotional annual price at the end of the trial. The free trial is intended for new Finn Pro users only. Finvest may determine trial eligibility at its sole discretion and may deny, revoke, or modify trial access in cases of suspected fraud, abuse, duplicate accounts, or attempts to bypass eligibility requirements.

4. Automatic Renewal

Finn Pro subscriptions renew automatically unless canceled before the applicable billing or renewal date.

By starting a free trial or purchasing a subscription, you authorize Finvest and/or its payment processor to automatically charge your payment method:

- At the end of the free trial period, unless canceled before the trial ends;
- At the start of each paid subscription period; and
- On each monthly or annual renewal date, depending on the plan you select.

The renewal charge will be based on your selected plan, any applicable promotional terms, taxes, and the then-current price of the plan at the time of renewal. To avoid being charged, you must cancel before the end of your free trial or before your next billing or renewal date.

5. Billing and Payment

You must provide accurate, complete, and current billing information when starting a free trial or purchasing Finn Pro. Subscription fees are charged in advance for the applicable billing period. If your payment method is declined, expires, or cannot be charged, Finvest may attempt to charge the payment method again, request updated payment information, suspend your access to Finn Pro, or cancel your subscription. You are responsible for any applicable taxes, duties, or governmental charges associated with your subscription, except for taxes based on Finvest's income.

6. Cancellation

You may cancel your Finn Pro subscription at any time through your account settings, app store subscription settings, or any other cancellation method made available by Finvest. To avoid being charged after a free trial, you must cancel before the trial ends. To avoid a renewal charge, you must cancel before your next billing or renewal date. If you cancel during a paid subscription period, you will generally retain access to Finn Pro until the end of the current billing period, unless otherwise stated by Finvest or required by applicable law. Canceling your subscription does not automatically entitle you to a refund for amounts already paid.

7. Refunds

Subscription fees are generally non-refundable, including for partially used billing periods, unless required by applicable law or expressly approved by Finvest. Finvest may, at its discretion, provide refunds, credits, or other accommodations in certain circumstances. Providing a refund, credit, or accommodation in one case does not require Finvest to provide the same treatment in another case. If you subscribed through a third-party platform, such as the Apple App Store or Google Play, refunds, cancellations, and billing issues may be handled by that platform according to its own policies.

8. Plan Changes and Price Changes

Finvest may change the price of Finn Pro, introduce new subscription plans, modify existing plans, or change the features included in any plan. If Finvest changes the price of your subscription, Finvest will provide notice as required by applicable law. Price changes will generally apply at the start of your next billing period or renewal period, unless otherwise stated. If you do not agree to a price change, you may cancel your subscription before the new price takes effect.

9. Features and Availability

Finn Pro features may change over time. Finvest may add, remove, modify, suspend, or discontinue features, tools, integrations, insights, reports, alerts, data sources, or other functionality at any time. Finvest does not guarantee that any specific feature, integration, data source, or functionality will always be available. Finn Pro may be unavailable, delayed, interrupted, limited, inaccurate, or affected by maintenance, outages, third-party service issues, data provider issues, market conditions, technical problems, or events outside Finvest's control.

10. Account Access and Restrictions

Your Finn Pro subscription is for your personal use only and may not be shared, resold, transferred, sublicensed, or used by another person unless expressly permitted by Finvest. You are responsible for maintaining the confidentiality of your account credentials and for all activity that occurs under your account. Finvest may suspend or terminate your access to Finn Pro if Finvest believes you have violated these Terms, failed to pay applicable fees, misused the service, created risk for Finvest or others, or violated applicable law.

11. No Financial, Investment, Tax, or Legal Advice

Finn Pro may provide financial information, portfolio analysis, market data, AI-generated insights, planning tools, educational content, and other information. Unless separately agreed in writing, Finn Pro does not provide legal, tax, accounting, or personalized investment advice. Any information, insight, alert, report, analysis, or output provided through Finn Pro is for informational and educational purposes only and should not be interpreted as:

- A recommendation;
- A solicitation;

- Investment advice;
- Tax advice;
- Legal advice;
- Accounting advice; or
- An endorsement of any investment strategy, security, account type, financial product, or course of action.

You are solely responsible for evaluating whether any information provided through Finn Pro is appropriate for your circumstances. You should consult qualified professionals before making financial, investment, tax, legal, or other important decisions.

12. Third-Party Services and Data

Finn Pro may rely on third-party services, data providers, financial institutions, brokerage platforms, account aggregation providers, payment processors, app stores, or other external partners. Finvest is not responsible for the availability, accuracy, actions, omissions, policies, or practices of third-party services. Your use of third-party services may be subject to separate terms, conditions, privacy policies, fees, and eligibility requirements.

13. Taxes

You are responsible for any federal, state, local, or other taxes associated with your Finn Pro subscription, except for taxes based on Finvest's income. Subscription fees may be subject to applicable taxes depending on your location and the payment method or platform used.

14. Termination

Finvest may suspend or terminate your subscription or access to Finn Pro if you violate these Terms, fail to pay applicable fees, misuse Finn Pro, create risk for Finvest or others, or if Finvest is required to do so by law. If your subscription is terminated, you may lose access to Finn Pro immediately or at the end of your billing period, depending on the circumstances. Finvest may also discontinue Finn Pro or any part of Finn Pro at any time, subject to applicable law.

15. Changes to These Terms

Finvest may update these Terms from time to time. If Finvest makes material changes, Finvest will provide notice as required by applicable law. Your continued use of Finn Pro after updated Terms take effect means you accept the updated Terms. If you do not agree to the updated Terms, you should cancel your subscription and stop using Finn Pro.

16. Contact

For questions about Finn Pro, billing, cancellation, or these Terms, please contact Finvest Support via the app or email us at support@getfinvest.com.