RIDGELINE WEALTH PLANNING LLC
1700 LYONS ROAD, SUITE B, CENTERVILLE, OH 45458
937.739.3744
TEAM@RIDGELINEWEALTHPLANNING.COM

PRIVACY POLICY

Investment advisers are required by law to inform their clients of their policies regarding the privacy of client information. We are bound by professional standards of confidentiality that are even more stringent than those required by law. Federal law gives the client the right to limit some but not all sharing of personal information. It also requires us to tell you how we collect, share, and protect your personal information.

TYPES OF NONPUBLIC PERSONAL INFORMATION (NPI) WE COLLECT

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization. This can include but is not limited to your Social Security Number, date of birth, banking information, financial account numbers and/or balances, sources of income, payment history and credit card numbers or information. When you are no longer our client, we may continue to share your information only as described in this notice. We are required by law to maintain this information for a number of years even after you are no longer our client.

RWP may collect information from client meetings via an AI notetaker.

PARTIES TO WHOM WE DISCLOSE INFORMATION

All Investment Advisers may need to share personal information to run their everyday business. Everything we do is guided by a commitment to serve you with excellence and to protect your privacy. The following are reasons we may share your personal information:

- To support your everyday needs – We use your information to help process transactions, maintain your account(s), comply with legal requirements like court orders or investigations, and report to credit bureaus when necessary.
- To keep you informed – Occasionally, we may reach out to share products or services we believe could be helpful or relevant to you.
- To collaborate responsibly – We may work with other financial companies to jointly offer services that could benefit you.
- To improve your experience – Our affiliated companies may use your information to better understand your needs, including your transaction history and credit profile.
- At this time RWP does not pursue any joint marketing, if in the future we choose to do so, this policy will apply.

When you become a new client, we may begin sharing your information on the day you sign our agreement in order to provide you with excellent service. However, you can contact us at any time to limit our sharing.

PROTECTING CONFIDENTIALITY OF CURRENT AND FORMER CLIENT'S INFORMATION

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law, including computer safeguards, protected file systems and building security.

SMS consent will not be shared with any third party and affiliates for marketing, nor will the phone numbers for SMS purpose.

FEDERAL & STATE LAW ALLOWS YOU TO LIMIT SHARING – OPTING OUT

Federal law allows you the right to limit the sharing of your NPI by "opting-out" of the following: sharing for non-affiliates' everyday business purposes – information about your creditworthiness; or sharing with affiliates or non-affiliates who use your information to market to you. State laws and individual companies may give you additional rights to limit sharing. If you limit sharing for a joint account, your choices will apply to everyone on the account. Please notify us immediately if you choose to opt out of these types of sharing by calling 937.739.3744.

DEFINITIONS: Affiliates – companies related by common ownership or control. Non-affiliates – companies not related by common ownership or control. Affiliates or non-affiliates can include financial and non-financial companies. Joint marketing – a formal agreement between non-affiliated financial companies that together market financial products or services to you.

Please call if you have any questions. Your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

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