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# PRIVACY POLICY NOTICE

Last Reviewed March 24, 2022

Meridian Wealth Management, LLC (Meridian) is committed to safeguarding the use of your personal information that we possess as your Investment Advisor. Meridian (also referred to as we, our, and us throughout this notice) protects the security and confidentiality of the personal information we have and implements control to ensure that such information is used for proper business purposes in connection with the management or servicing of our relationship with you.

Meridian does not sell your non-public personal information to anyone, nor do we provide such information to others except for discrete and proper business purposes connected with the servicing and management of our relationship with you, as discussed below.

Details of our approach to privacy and how your personal non-public information is collected and used are outlined in our Privacy Policy.

| WHY DO YOU NEED TO KNOW? |
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| Registered Investment Advisors (RIAs) share some of your personal information. Federal and state laws give you the right to limit some of this sharing. Federal and state laws require RIAs to disclose how we collect, share, and protect your personal information. |

| WHAT TYPES OF INFORMATION DO WE COLLECT FROM YOU? | |
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| Social Security or taxpayer identification number | Assets and liabilities |
| Name, address, phone number, and email address | Income and expenses |
| Driver's license or state issued identification card number | Investment activity |
| Account information (including other institutions) | Investment experience and goals |

| HOW DO WE SHARE YOUR INFORMATION? |
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| RIAs do need to share personal information regarding their clients to implement the RIA's services effectively. In the section below, we list some reasons we may share your personal information. |

| BASIS FOR SHARING | SHARING | LIMITATIONS |
|---|---|---|
| **Servicing Our Clients –** We may share non-public personal information with non-affiliated third parties (such as custodians, regulators, other financial institutions), as necessary, for us to provide you with the agreed-upon services that are consistent with applicable law, including but not limited to:<br>• Processing transactions<br>• General account maintenance<br>• Responding to regulators or legal investigations | Meridian may share this information. | Clients cannot limit the Advisor's ability to share. |
| **Administrators –** We may disclose your non-public personal information to companies we hire to help administrate our business. Companies we hire to provide services of this kind are not allowed to use your personal information for their purposes and are contractually obligated to maintain strict confidentiality. We limit their use of your personal information to the performance of the specific service we have requested. | Meridian may share this information. | Clients cannot limit the Advisor's ability to share. |
| **Marketing Purposes –** Meridian does not disclose and does not intend to disclose personal information with non-affiliated third parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where Meridian or the client has a formal agreement with the financial institution. **We will only share information for purposes of servicing your accounts, not for marketing purposes.** | Meridian does not share personal information. | Clients cannot limit the Advisor's ability to share. |

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| **Authorized Users –** Your non-public personal information may also be disclosed to persons we believe to be your authorized agent or representative. | Meridian does share personal information. | Clients can limit the Advisor's ability to share. |
| **Information About Former Clients –** Meridian does not disclose and does not intend to disclose non-public personal information to non-affiliated third parties on persons who are no longer our clients. | Meridian does not share personal information regarding former clients. | Clients can limit the Advisor's ability to share. |

| HOW DO WE PROTECT YOUR INFORMATION? |
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| To safeguard your personal information from unauthorized access and use, we maintain physical, procedural, and electronic safeguards. These include computer safeguards such as passwords and secured files. Client files are physically locked during non-business hours. |
| Our employees are advised about Meridian's need to respect the confidentiality of each client's non-public personal information. Employees are required to shred documents when disposing of physical files containing clients' non-public personal information. |
| We require third parties that assist in providing our services to you to protect the personal information they receive. |

| CHANGES TO OUR PRIVACY POLICY |
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| We will send you notice of our Privacy Policy annually for as long as you maintain an ongoing relationship with us. |
| Periodically we may revise our Privacy Policy and will provide you with a revised policy if the changes materially alter the previous Privacy Policy. However, we will not revise our Privacy Policy to permit the sharing of non-public personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing. |

**"Opting-out" of Third-Party Disclosures:** If you do not want your investment advisor representative to retain copies of your sensitive client information when he or she leaves us to join another firm, you may contact us by calling (859) 543-4516.

**Questions:** You may ask questions or voice any concerns by contacting us at (859) 543-4516.