

# MERIDIAN PASSAGE



## PRIVACY POLICY

Effective: May 7, 2026

### OUR COMMITMENT TO YOU

Meridian Passage, LLC (“Meridian Passage,” also referred to as “we,” “our,” and “us”) is committed to safeguarding the non-public personal information (“Information”) of the clients to whom we provision advisory services (“Clients,” also referred to as “you” and “your”), as described in this Privacy Policy (the “Policy”).

Our relationship with you is our most important asset. We understand that you have entrusted us with your Information, and we do everything that we can to maintain that trust. We protect the security and confidentiality of the Information in our possession and implement controls to ensure that it is only used for proper business purposes.

We do not sell your Information to anyone. Nor do we provide it to others, except for discrete and reasonable business purposes in connection with the servicing and management of our relationship with you.

Details of our approach to privacy and how your Information is collected and used are set forth in this Policy.

### WHY YOU NEED TO KNOW

Registered Investment Advisors (“RIAs”) may obtain some of your Information in the course of servicing your account, and may be required to share that information in limited circumstances. Federal and State laws give you the right to limit some of this sharing and require RIAs to disclose how we collect, share, and protect your Information.

### INFORMATION WE MAY COLLECT FROM YOU

Driver’s license number	Date of birth
Social security or taxpayer identification number	Assets and liabilities
Name, address and phone number	Income and expenses
E-mail address	Investment activity
Account information (including other institutions)	Investment experience and goals

### INFORMATION WE MAY COLLECT FROM OTHER SOURCES

Custody, brokerage and advisory agreements	Account applications and forms
Other advisory agreements and legal documents	Investment questionnaires and suitability documents
Transactional information with us or others	Other information needed to service account

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## HOW WE PROTECT YOUR INFORMATION

To safeguard your Information from unauthorized access and use, we maintain physical, procedural, and electronic security measures, including secure passwords and a secure office environment. Our technology vendors provide security and access control over Information and have policies over the transmission of data. Our personnel are trained on their responsibilities to protect Client's Information, and we require third parties that assist in providing our services to you to protect the Information they receive from us.

## HOW WE SHARE YOUR INFORMATION

An RIA shares Client Information to effectively implement its services. The matrix below summarizes the bases on which we may share your Information.

BASIS FOR SHARING	DO WE SHARE?	CAN YOU LIMIT?
<b>Servicing Our Clients</b> We may share Information with non-affiliated third parties (such as brokers, custodians, regulators, or other financial institutions) as necessary for us to provide agreed upon services to you, consistent with applicable law, including but not limited to: processing transactions; general account maintenance; responding to regulators, or legal investigations.	Yes	No
<b>Marketing Purposes</b> Meridian Passage does not disclose, and does not intend to disclose, Information with non-affiliated third parties to offer you services. <b>We will only share Information for purposes of servicing your accounts, not for marketing purposes.</b>	No	Not Shared
<b>Authorized Users</b> Your Information may be disclosed to you and persons that we believe to be your authorized agent(s) or representative(s).	Yes	Yes
<b>Information About Former Clients</b> We do not disclose, and do not intend to disclose, Information to non-affiliated third parties with respect to persons who are no longer our Clients.	No	Not Shared

## CHANGES TO THIS POLICY

We will send you a copy of this Policy annually for as long as you maintain an ongoing relationship with us. Periodically we may revise this Policy and will provide you with the revised Policy if any changes materially alter the previous version. We will not, however, revise our Policy to permit the sharing of Information other than as described in this notice, unless we first notify you and provide you with an opportunity to prevent the Information sharing.

## QUESTIONS

Questions, concerns, or requests for a current copy of this Policy may be directed to [info@meridianpassage.net](mailto:info@meridianpassage.net).