

The Parkridge Group, LLC

Privacy Policy

Our Commitment to Our Clients

The Parkridge Group, LLC is committed to protecting the privacy and security of our clients' information. Our clients trust us with personal and financial information and we honor that trust by handling all information carefully and sensibly. This notice outlines the standards we use for protecting information.

Security Standards

The Parkridge Group continually reviews, updates and improves our security standards and procedures to help us protect confidential information. To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include:

- computer safeguards, secured files and buildings;
- regular training of associates on privacy and information security, and on their obligations to protect client information;
- limiting employee access to client information to those who have a business reason to know; and
- secure destruction of client information.

The Information We Gather to Better Serve Our Clients

As an investment advisor, The Parkridge Group may collect personal information including:

- Social Security Number and Address
- Income and Assets
- Account Transactions

This information is critical to our management of investment portfolios. If you are no longer a client of ours, we will continue to hold onto information as described in this notice and pursuant to applicable rules and regulations. When appropriate, material that contains confidential client information is carefully and securely destroyed.

The Information We Share

We do not share client information with outside parties who may wish to market their products to you. We may disclose the information we collect to non-affiliated third parties that are acting on our behalf, or as permitted or required by law, including:

- Companies that perform support services for us, such as brokerage services and asset and accounting reconciliations.

- Non-affiliated third parties such as attorneys, accountants, auditors, and persons or consulting firms who are evaluating our business or are assessing our compliance with industry standards.
- Companies that help us market products and services to you or conduct surveys or provide marketing research.
- Government entities, courts or other entities (in response to subpoenas and other legal processes), or those with whom you have requested us to share information.

We enter into contractual agreements with all nonaffiliated third parties that prohibit them from disclosing or using the information other than to carry out the purposes for which we disclose the information. No personal information, including that regarding a client's investment portfolio or the terms of their management agreement with The Parkridge Group will be disclosed, except with the client's express permission, as permitted or required by law, or as necessary to provide services.

In all cases, we will require those firms to adhere to strict standards of security and confidentiality. They will not be permitted to release, to use, or to transfer any of our clients' information to any other party for their own purposes. In all cases, we recognize the great responsibility we have on behalf of our clients to maintain the security and the confidentiality of their personal information.

Offering Choices

The Parkridge Group offers a variety of financial products and services that may be of interest to our clients. We believe it is beneficial to educate our clients on these products and services. We recognize, however, that our clients might have preferences about how we contact them. Clients may also have questions about how we will handle specific circumstances regarding their personal information as well as the security and availability of this information. To discuss these or any other questions, or to provide feedback, please contact us at --

The Parkridge Group LLC
99 Parkridge Lane
Pittsburgh, PA 15228
Attn: Patrick Reidy

Information for Vermont and California Customers

In response to a Vermont regulation, if we disclose personal information about you to nonaffiliated third parties with whom we have joint marketing agreements, we will only disclose your name, address, other contact information and information about our transactions or experiences with you. In response to a California law, we automatically treat accounts with California billing addresses as if you do not want to disclose personal information about you to nonaffiliated third parties except as permitted by the applicable California law. We will also limit the sharing of personal information about you with our affiliates to comply with all California privacy laws that apply to us.

Updated as of December 2022