Updated: 2026

FACTS	**WHAT DOES RISKBRIDGE ADVISORS, LLC DISCLOSE?**

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

What?	The types of personal information we collect and share depend on the product or service you have with us. This information can include: ■ Social Security number and other personal information ■ income level and net worth ■ investment history and investment goals When you are *no longer* our customer, we continue to share your information as described in this notice.

How?	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information, the reasons RISKBRIDGE ADVISORS, LLC chooses to share, and whether you can limit this sharing.

Reasons we can share your personal information	Does RiskBridge Advisors, LLC share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes — to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We don't share
For our affiliates' everyday business purposes — information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes — information about your creditworthiness	No	We don't share
For our affiliates to market to you	No	We don't share
For our non-affiliates to market to you	No	We don't share

Questions?	Call (203) 658-6055 or go to www.riskbridgeadvisors.com

Who we are	
Who is providing this notice?	RISKBRIDGE ADVISORS, LLC
What we do	
How does RISKBRIDGE ADVISORS, LLC protect my personal 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 and secured files and buildings.
How does RISKBRIDGE ADVISORS, LLC collect my personal information?	We collect your personal information, for example, when you: ■ open a managed account ■ enter into an investment management agreement with us ■ complete investor questionnaires ■ correspond with us or obtain information about our advisory services ■ make investments or redeem investments We also collect your personal information from third parties, such as credit bureaus, affiliates, and other companies.
Why can't I limit all sharing?	Federal law gives you the right to limit only: ■ sharing for affiliates' everyday business purposes—information about your creditworthiness ■ affiliates from using your information to market to you ■ sharing for non-affiliates to market to you State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.
Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. Our affiliates include RISKBRIDGE PRIVATE WEALTH, LLC, RISKBRIDGE ADVISORS, LLC d/b/a FINLEY DAVIS PRIVATE WEALTH, RISKBRIDGE PARTNERS, LLC, and TOMAH MANAGEMENT, LLC.
Nonaffiliates	Companies not related by common ownership or control can be financial or non-financial. Nonaffiliates we share with can include financial service providers and others. FINLEY DAVIS FINANCIAL GROUP, INC.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. NONE.
Other important information	