

Meridian Wealth Management, LLC
100 W. Main Street, Suite 450
Lexington, KY 40507

PRIVACY POLICY NOTICE

Effective: March 31, 2026

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.

PRIVACY POLICY

An important part of the relationship we have with our clients is the information they share with us. We want each client to know how we treat their private information. We keep personal information such as Social Security Numbers and account balances confidential. We take steps to safeguard this data from anyone who should not have access to it. **We do not sell this information to anyone.**

In dealing with Meridian Wealth Management, LLC clients can expect that we will take the steps outlined below to keep all their information confidential and secure.

OUR PRIVACY POLICY

In providing financial services and products ("Service") to our clients, we collect certain non- public information about them. Our policy is to keep this information confidential and strictly safeguarded, and to use or disclose it only as needed to provide services to our clients, or as permitted by law. Protecting your privacy is important to us.

INFORMATION WE COLLECT

The non-public personal information we have about clients includes the information they give us when opening an account or communicating with us. This could include:

- Name, address, phone number, and email address
- Social Security Number or Taxpayer Identification Number
- Driver's License or State-Issued Identification Card Number
- Investment objectives, experience, and goals
- Financial circumstances such as income, expenses, assets, and liabilities.
- Employment history
- Account Information such as balances, transactions, and investment activities

HOW WE SHARE YOUR PERSONAL INFORMATION

We do not sell personal client information to anyone.

Affiliates. We may share personal information about you with our affiliated companies for everyday business purposes, however, our affiliated companies are not permitted to use this information to market their products or services to you.

We do not disclose personal information about our clients to non-affiliated third parties, without expressed written consent. We may disclose anonymous information that cannot be linked to an individual client on occasion, but only to companies that we hire to help us provide products and services to our clients, or as required by law, or as authorized by the client personally, or as otherwise described in this Privacy Policy.

Service Providers. Companies and individuals that provide services on our behalf or help us operate our services and business (such as IT, hosting, investment trading, customer relationship management and support, print and mail fulfillment, data management, email delivery, etc.).

Service-Related Third Parties. Brokers, custodians, administrators, transfer agents, investment funds and their respective managed and other non-affiliated third parties as necessary to provide our services to you.

HOW INFORMATION IS USED

We use your personal information for the following purposes:

Service Delivery. We use your personal information to provide, operate, and improve the Service; execute your transactions; provide support for the service; and respond to your inquiries, questions and feedback.

Compliance and Operations. We may use your personal information to: comply with applicable laws, lawful requests, and legal process, such as to respond to subpoenas or requests from government authorities; protect our, your or others' rights, privacy, safety or property (including by making and defending legal claims); audit our internal processes for compliance with legal and contractual requirements and internal policies; and prevent, identify, investigate and deter fraudulent, harmful, unauthorized, unethical or illegal activity, including cyberattacks and identity theft.

HOW INFORMATION IS SAFEGUARDED

We have procedures in place that we believe are reasonably designed to protect the security and confidentiality of client information. These include confidentiality agreements with companies we hire to help us provide services to clients, password-protected user access to our computer files, and strict confidentiality policies that apply to all MWM personnel, vendors and contractors.

YOUR DATA CHOICES

You have the following choices with respect to your personal information:

Decline to provide information. We need to collect personal information to provide certain services. If you do not provide the information requested, we may not be able to provide those services.

How to contact us. You can reach us in the following ways:

- Mail: 100 West Main Street, Suite 450 Lexington, KY 40507
- Website: www.meridianwealthllc.com
- Phone: (859) 543-4516
- Email: Compliance@meridianwealthllc.com



Located At:

180 Front St. S
Issaquah, WA 98027

Supervised From:

100 West Main Street, Suite 450
Lexington, KY 40507
Phone: (859) 543-4516
Fax: (859) 543-4523

Jason Andrew Totedo

Wealth Management Advisor

Individual CRD No. 2506709

Form ADV Part 2B – Brochure Supplement

Effective: October 1, 2026

This Form ADV Part 2B ("Brochure Supplement") provides information about the background and qualifications of Jason Andrew Totedo ("Mr. Totedo") as a supplement to the information contained in Meridian Wealth Management, LLC's (referred to as "we," "our," "us," "Firm," "Advisor," or "MWM") Form ADV Part 2A Disclosure Brochure. You should have received a copy of that Disclosure Brochure. If you have not received a copy of the Disclosure Brochure or if you have any questions about the contents of the firms' Disclosure Brochure or this Brochure Supplement, please contact Meridian Wealth Management, LLC at (859) 543-4516.

Additional information about Mr. Totedo is available on the SEC's Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov. The site is searchable by a unique identifying number known as a CRD number. Mr. Totedo's CRD number is 2506709.

Item 2: Educational Background and Business Experience

Jason Andrew Totedo was born in 1969 and received his degree in Economics from the University of Delaware. Mr. Totedo is dedicated to advising clients of Meridian Wealth Management, LLC as a Wealth Management Advisor. Additional information regarding Mr. Totedo's business background for the preceding five years is included below.

BUSINESS BACKGROUND

10/2026 – Present	Meridian Wealth Management, LLC	Wealth Management Advisor
02/2019 – 09/2026	Long Term Capital	Advisor

LICENSES AND DESIGNATIONS

Mr. Totedo holds his Series 65 License. This license is designed to qualify candidates as Investment Adviser Representatives (IAR). The exam covers topics that have been determined to be necessary to understand in order to provide investment advice to clients. To qualify, you must pass an examination administered by FINRA consisting of 130 questions. IARs are also required to complete annual continuing education requirements to maintain their license.

CHARTERED FINANCIAL ANALYST (CFA)

Chartered Financial Analysts are licensed by the CFA Institute to use the CFA mark. In order to qualify, one must hold a bachelor's degree from an accredited institution or have equivalent education or work experience, have successful completion of all three exam levels of the CFA Program, and have 48 months of acceptable professional work experience in the investment decision making process. Furthermore, they must fulfill society requirements, which vary by society. Unless you are upgrading from affiliate membership, all societies require two sponsor statements as part of each application; these are submitted online by your sponsors. Chartered Financial Analysts must agree to adhere to and sign the Member's Agreement, a Professional Conduct Statement, and any additional documentation requested by CFA Institute.

Item 3: Disciplinary Information

Thise are no material legal, civil, or disciplinary events to disclose regarding Mr. Totedo's investment related business activities. However, we do encourage you to independently view the background of Mr. Totedo on the Investment Adviser Public Disclosure website at www.adviserinfo.sec.gov by searching with his full name or his Individual CRD No. 2506709.

Item 4: Outside Business Activities

Mr. Totedo is licensed to sell term insurance for clients that require it, for which he will receive additional compensation. These services are offered through Meridian Insurance Services, LLC. Any commissions received through the sales of insurance policies do not offset advisory fees the client may pay for advisory services provided by MWM. Clients are not required to purchase insurance products from Mr. Totedo and may seek similar services elsewhere.

Amelia, LLC is an entity held by Mr. Totedo that is a single member LLC. This entity holds Mr. Totedo's ownership in LTCM, LLC.

Long Term Capital Management, LLC (LTCM, LLC.) is a single member pass-through entity for advisory

fees paid by MWM to Mr. Totedo.

Item 5: Additional Compensation

Mr. Totedo does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through Meridian Wealth Management, LLC. Mr. Totedo may receive additional compensation for insurance products sold through Meridian Insurance, LLC.

Item 6: Supervision

The supervision of Mr. Totedo with respect to compliance is performed by Mallory Pagano in his capacity as Chief Compliance Officer of Meridian Wealth Management, LLC. MWM has implemented a Compliance Manual and Code of Ethics which guides the Firm and its supervised persons in meeting their fiduciary obligations to the firms' clients when providing investment advisory services. As MWM's Chief Compliance Officer, Ms. Pagano is responsible for the implementation of the Firm's compliance policies and procedures and Code of Ethics. Ms. Pagano may be contacted at (859) 543-4516 for more information about this Brochure Supplement.

Additionally, Meridian Wealth Management, LLC is subject to regulatory oversight by various agencies. These agencies require registration by the firm and its supervised persons. As a registered entity, Meridian Wealth Management, LLC is subject to examinations by regulators, which can be announced or unannounced. The firm is required to periodically update the information provided to these agencies and to provide various reports regarding the business activities and assets of the Firm.