

Privacy Notice

Revised 10/2026

FACTS	WHAT DOES LEONARD RICKEY INVESTMENT ADVISORS (“LRIA”) DO WITH YOUR PERSONAL INFORMATION?
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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 government identifiers • Income, assets, and financial goals • Wire transfer instructions and account numbers • Transaction history and investment holdings • Content of meetings, calls, and electronic communications with us, including notes and summaries prepared by us or our approved service providers When you are <i>no longer</i> 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 LRIA chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does LRIA share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transactions, maintain your account(s), or 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	Not applicable
For our affiliates’ everyday business purposes — information about your transactions and experiences	No	Not applicable
For our affiliates’ everyday business purposes — information about your creditworthiness	No	Not applicable
For our affiliates to market to you	No	Not applicable
For non-affiliates to market to you	No	Not applicable

Questions?	Please call us at 509-972-3686 or visit our website at www.bestpathforward.com
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Who we are	
Who is providing this notice?	Leonard Rickey Investment Advisors (“LRIA”)

What we do	
How does ADVISOR protect my personal information?	To protect your personal information from unauthorized access and use, we maintain a comprehensive Written Information Security Plan that includes administrative, technical, and physical safeguards designed to comply with federal and state law. These measures include: encryption of data in transit and at rest; multi-factor authentication and role-based access controls; secure facilities and regular security training for employees; written contracts, including Data Processing Agreements, with third-party service providers who process client information, requiring them to maintain appropriate safeguards, notify us of any breach within 72 hours, and protect your information consistent with the standards applicable to us; a written Incident Response Program enabling us to detect, respond to, and recover from unauthorized access, and to provide timely notice to affected clients where required; and a governance program for artificial intelligence (AI) technologies used in our business.
How does ADVISOR collect my personal information?	We collect your personal information, for example, when you: • Enter into an investment advisory contract • Meet with us in person or by video conference, or communicate with us by phone, email, or secure messaging • Provide documents or information through our approved client portals or document-sharing platforms • Authorize us to receive information on your behalf from custodians, retirement plans, insurance companies, employers, tax professionals, or other financial institutions We also collect your personal information from other companies, including financial institutions that maintain your accounts and service providers we engage to assist us in servicing you.
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.
What happens when I limit sharing on an account I hold jointly with someone else?	Your choices will apply to everyone on your account.

Definitions	
Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • <i>Pathway Tax Group, PLLC is owned by certain LRIA principals.</i>
Non-affiliates	Companies not related by common ownership or control. They can be financial and non-financial companies. • <i>LRIA does not share with non-affiliates so they can market to you</i>
Joint marketing	A formal agreement between non-affiliated financial companies that together market financial products or services to you. • <i>LRIA does not jointly market.</i>