



LinePoint Partners & Co., LLC Privacy Disclosures

Effective: October 15, 2024

LinePoint is committed to safeguarding the use of personal information of our clients and advisors, and prospective clients and advisors, (also referred to as “you” and “your”), as described in our Privacy Policy.

For advisors and prospective advisors: LinePoint collects information that you voluntarily provide, which may include your name, email address, phone number, city/state, assets under advisement, and other relevant professional details. This information is used solely for the purpose of assessing potential partnerships, evaluating services, and contacting you with relevant information regarding our offerings. LinePoint does not sell or share this information with any third parties unless required by law. We employ industry-standard security measures to protect the personal information you provide. However, no system is completely secure, and we cannot guarantee the absolute security of your information. You have the right to request access to the personal information we hold about you, correct inaccuracies, or request its deletion by contacting LinePoint at compliance@linepointpartners.com.

For clients and prospective clients: LinePoint does not collect personal non-public information about you through this website (“Website”); however, LinePoint may collect information from you on application forms, agreements, general client profile questionnaires, and other related forms or documents received or processed in relation to services we provide. We also may collect information from other sources.

We do not track your activity across third-party websites to provide targeted advertising. However, we may track your interactions with our Website to help us improve our content and functionality.

We may use “cookies” and similar online technologies to keep, and sometimes track, information about you regarding your usage of our Website. Cookies are small data files that are sent to your browser or related software from a web server and stored on your device. Cookies help us to collect information about your usage of our Website, including date and time of visits, pages viewed, amount of time spent on our sites, or general information about the device used to access the site, such as the browser used. You can refuse to store or delete cookies by configuring your web browser settings. Most browsers and mobile devices have their own settings to manage cookies. If you refuse a cookie when on our Website, or if you delete cookies, you may experience some inconvenience in your use of our Website, such as having to re-configure preferences.

When you are on this Website, you may have the opportunity to click-through to other websites, including websites operated by unaffiliated third parties. These sites may collect non-public personal information about you. We do not control sites operated by these entities and are not responsible for the information practices of these sites. This Privacy Policy does not cover the information practices of other websites. The privacy policies of Websites operated by third parties are located on those sites.

For more detailed information on how we collect, use, and safeguard personal information, please contact us at compliance@linepointpartners.com.



LinePoint Partners & Co., LLC
Privacy Policy
Effective Date: September 15, 2024

Our Commitment to You. LinePoint Partners & Co., LLC (“LinePoint”) is committed to safeguarding the use of personal information of our clients (also referred to as “you” and “your”) that we obtain as your investment adviser, as described here in our Privacy Policy (“Policy”).

Our relationship with you is our most important asset. We understand that you have entrusted us with your private information, and we do everything that we can to maintain that trust. LinePoint (also referred to as “we”, “our” and “us”) protects the security and confidentiality of the personal information we have and implements controls to ensure that such information is used for proper business purposes in connection with the management or servicing of our relationship with you.

LinePoint does not sell your non-public personal information to anyone. Nor do we provide such information to others except for discrete and reasonable business purposes in connection 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 set forth in this Policy.

Why you need to know? Registered Investment Advisers (“RIAs”) must share some of your personal information in the course of servicing your account. 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 personal information.

What information do we collect from you?

Social security or taxpayer identification number	Assets and liabilities
Name, address and phone number(s)	Income and expenses
E-mail address(es)	Investment activity
Account information (including at other institutions)	Investment experience and goals

What information do we 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

How do we protect your information? To safeguard your personal information from unauthorized access and use, we maintain physical, procedural and electronic security measures. These include such safeguards as secure passwords, encrypted file storage and a secure office environment. Our technology vendors provide security and access control over personal information and have policies over the transmission of data. Our associates are trained on their responsibilities to protect clients’ personal information.

We require third parties that assist in providing our services to you to protect the personal information they receive from us.



How do we share your information? An RIA shares client personal information to effectively implement its services. In the section below, we list some reasons we may share your personal information.

Basis for sharing	Do we share?	Can you limit?
<p>Servicing our clients We may share non-public personal information with non-affiliated third parties (such as administrators, broker-dealers, custodians, regulators, credit agencies, and 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; and credit reporting.</p>	Yes	No
<p>Marketing purposes LinePoint does not disclose, and does not intend to disclose, personal information with non-affiliated third parties to offer you services. Certain laws may give us the right to share your personal information with financial institutions where you are a customer and where LinePoint or the client has a formal agreement with the financial institution. We will only share information for purposes of servicing your accounts, not for marketing purposes.</p>	No	Not Shared
<p>Authorized users Your non-public personal information may be disclosed to you and persons that we believe to be your authorized agent(s) or representative(s).</p>	Yes	Yes
<p>Information about former clients LinePoint does not disclose, and does not intend to disclose, non-public personal information to non-affiliated third parties with respect to persons who are no longer our clients.</p>	No	Not Shared

Changes to our Privacy 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 a revised policy if the changes materially alter the previous Privacy Policy. We will not, however, revise our Privacy Policy to permit the sharing of non-public personal information other than as described in this notice unless we first notify you and provide you with an opportunity to prevent the information sharing.

Any Questions? You may ask questions or voice any concerns, as well as obtain a copy of our current Privacy Policy by contacting LinePoint at (323) 886-3635 or via email at compliance@linepointpartners.com.