

Privacy Notice

Effective September 28, 2026

This notice describes how RetireVest Financial, LLC collects, uses, shares, and protects personal information in connection with our advisory services and website.

Information we collect

When providing advisory services, we may collect nonpublic personal information such as your name, address, Social Security number, date of birth, financial account numbers, income and employment information, investment objectives, risk profile, beneficiary information, banking information, and information about your transactions.

We collect information directly from you, from documents you provide, and from transactions processed through our custodian, Altruist.

When you visit our website or submit a contact form, we may collect information you provide, such as your name, email address, telephone number, and message. Our website may also collect limited technical information, such as IP address, device and browser information, and basic website-usage data.

How we use and share information

We use personal information to provide and administer our services, open and service accounts, process transactions, maintain required records, respond to inquiries, operate and secure our website, understand general website traffic, and meet legal and regulatory obligations.

We do not sell personal information. We do not share personal information with nonaffiliated third parties for their own marketing purposes, and we do not obtain information from consumer-reporting agencies.

We may share information as permitted by law with our custodian and with service providers that support secure email, document storage, electronic signatures, website hosting and forms, communications, basic analytics, technology, professional services, and regulatory compliance. We require service providers to handle information in accordance with applicable confidentiality and security obligations.

These practices also apply to information about former clients.

Affiliated company

RetireVest Financial, LLC is affiliated through common ownership with Accelerate Financial Services, LLC. RetireVest Financial, LLC does not currently share nonpublic personal information with Accelerate Financial Services, LLC.

Your privacy choices

RetireVest Financial, LLC shares information only as permitted by law for servicing, processing, legal, regulatory, and other ordinary business purposes described in this notice. Because we do not share information in ways that create an additional right to limit sharing under this notice, no opt-out is necessary.

Website analytics and contact forms

The website uses Duda to host the site, process contact-form submissions, and provide basic traffic analytics. The temporary website does not use advertising pixels, remarketing tools, or cross-site tracking. Duda may use cookies or similar technologies needed to operate, secure, and measure use of the website.

Please do not submit account numbers, Social Security numbers, tax documents, health information, or other sensitive personal information through the website contact form.

How we protect information

We maintain physical, electronic, and procedural safeguards designed to protect personal information. Access is limited to persons and service providers that need the information to perform services or meet legal and regulatory obligations. No method of electronic transmission or storage is completely secure.

How long we keep information

We retain personal information for as long as reasonably necessary to provide services, respond to inquiries, meet legal and regulatory recordkeeping requirements, resolve disputes, and enforce agreements.

Changes to this notice

We may update this notice when our privacy practices change or when required by applicable law. The effective date above identifies the current version.

Contact us

For questions about this notice, contact RetireVest Financial, LLC at daveolsen10@gmail.com.