

## **Disclosure:**

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These Terms were last updated on November 25, 2024.

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Asset allocation may be used in an effort to manage risk and enhance returns. It does not, however, guarantee a profit or protect against loss. Performance of the asset allocation strategies depends on the underlying investments.

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Please remember that it remains your responsibility to advise Veridan Wealth, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

Veridan Wealth will provide all prospective clients with a copy of our current Form ADV, Part 2A ("Disclosure Brochure"), Form ADV Part 2B, which is the Brochure Supplement for each advisory person supporting a particular client, and the Form ADV Part 3 (Client Relationship Summary or Form CRS). You may obtain a copy of these disclosures on the SEC website at <http://adviserinfo.sec.gov> or you may [Contact Us](#) to request a free copy via .pdf or hardcopy.

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For a copy of the Veridan Wealth Privacy Policy, please click [here](#).

[Privacy Policy Veridan Wealth as of February 20, 2025.](#)

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