

Privacy Policy

Last Updated: August 31, 2026

Incline Wealth Advisors, LLC respects your privacy and is committed to protecting the personal information you provide to us.

This Privacy Policy describes how we collect, use, disclose, and safeguard information obtained through our website and other electronic communications with us.

Information We Collect

We may collect information that you voluntarily provide to us when you use this website, request information, schedule a meeting, subscribe to communications, complete a form, or otherwise communicate with us.

This information may include:

- Name
- Email address
- Telephone number
- Mailing address
- Information you provide in a contact or scheduling form
- Information contained in communications you send to us
- Other information you voluntarily provide

We may also automatically collect certain technical information when you visit our website, including your IP address, browser type, device type, operating system, referring website, pages viewed, dates and times of visits, and similar website usage information.

How We Use Information

We may use information collected through this website to:

- Respond to inquiries and requests
- Schedule and conduct meetings
- Provide information regarding our services
- Communicate with clients and prospective clients
- Operate, maintain, secure, and improve our website
- Analyze website usage and performance
- Maintain business and regulatory records

- Protect against fraudulent, unauthorized, or unlawful activity
- Comply with applicable legal and regulatory requirements

Submitting information through this website does not, by itself, create an investment advisory relationship with Incline Wealth Advisors.

Information About Clients

Incline Wealth Advisors may receive nonpublic personal information about clients in connection with providing investment advisory, financial planning, tax preparation, and related services.

We maintain policies and procedures designed to protect the confidentiality and security of client information. Incline Wealth Advisors, LLC's Code of Ethics also requires associated persons to maintain the confidentiality of client information except when disclosure is authorized by the client or required by law.

Additional privacy notices may be provided directly to clients as required by applicable law.

How We Share Information

We do not sell personal information collected through this website.

We may disclose information to service providers that assist us in operating our business or website, including technology providers, website hosting providers, scheduling platforms, communications providers, custodians, professional advisers, and other vendors performing services on our behalf.

We may also disclose information when reasonably necessary to:

- Comply with applicable laws, regulations, legal proceedings, court orders, or regulatory requests
- Protect the rights, property, security, or interests of Incline Wealth Advisors, our clients, or others
- Prevent or investigate suspected fraud or unlawful activity
- Facilitate a business transaction involving Incline Wealth Advisors, subject to applicable confidentiality and legal requirements

Cookies and Website Analytics

Our website may use cookies, analytics technologies, pixels, or similar technologies to understand how visitors use the website, maintain website functionality, and improve the visitor experience.

Your browser may allow you to block or delete cookies. Disabling certain cookies may affect the functionality of portions of the website.

Third-Party Websites and Services

Incline Wealth Advisors does not control the privacy practices, security, or content of third-party websites. Your use of third-party websites and services is subject to their respective terms and privacy policies.

For example, the current website uses an external scheduling service for meeting requests.

Information Security

We maintain administrative, technical, and physical safeguards designed to protect personal information against unauthorized access, disclosure, alteration, loss, or misuse.

However, no internet transmission or information-storage system can be guaranteed to be completely secure. You should exercise care when transmitting confidential information electronically.

Please do not transmit sensitive financial information, account numbers, Social Security numbers, passwords, or trading instructions through ordinary website contact forms or unsecured email.

Email and Electronic Communications

Email and other electronic communications may not be secure. Do not use email or website forms to transmit sensitive personal or financial information unless you are using a secure communication method provided or approved by Incline Wealth Advisors.

Clients should not use the website or email to submit time-sensitive securities trading instructions.

Children's Privacy

This website is intended for adults and is not directed to children under the age of 13. We do not knowingly collect personal information from children through this website.

Changes to This Privacy Policy

We may revise this Privacy Policy periodically to reflect changes in our practices, technology, legal requirements, or business operations. The date appearing at the top of this page indicates when the policy was most recently updated.

Contact Us

Questions regarding this Privacy Policy may be directed to:

Incline Wealth Advisors, LLC
4030 Smith Rd., Suite 200
Cincinnati, OH 45209
Phone: (513) 709-0004