



## **Privacy Policy for Blueprint Financial Consultants**

We recognize the importance of protecting our clients' privacy. We have policies to maintain the confidentiality and security of your nonpublic personal information. The following is designed to help you understand what information we collect from you and how we use that information to serve your account.

### ***Categories of Information We May Collect:***

In the normal course of business, we may collect the following types of information:

- Information you provide in the subscription documents and other forms (including name, address, social security number, date of birth, income, and other financial-related information); and
- Data about your transactions with us (such as the types of investments you have made and your account status).

### ***How We Use Your Information That We Collect***

Any and all nonpublic personal information that we receive with respect to our clients who are natural persons is not shared with nonaffiliated third parties which are not service providers to us without prior notice to, and consent of, such clients, unless otherwise required by law. In the normal course of business, we may disclose the kinds of nonpublic personal information listed above to non-affiliated third party service providers involved in servicing and administering products and services on our behalf. Additionally, we may disclose such non-public personal information as required by law (such as to respond to a subpoena) or to satisfy a request from a regulator and/or to prevent fraud. Without limiting the foregoing, we may disclose nonpublic personal information about you to governmental entities and others in connection with meeting our obligations to prevent money laundering including, without limitation, the disclosure that may be required by the Uniting and Strengthening America Act by

Providing Appropriate Tools Required to Intercept and Obstruct Terrorism(USA PATRIOT) Act of 2001 and the regulations promulgated thereunder. In addition, if we choose to dispose of our clients' nonpublic personal information that we are not legally bound to maintain, then we will do so in a manner that reasonably protects such information from unauthorized access. The same privacy policy also applies to former clients who are natural persons.

### ***Former Customers' Information***

Due to industry regulations, we are required to retain records for a period of years after the end of our business relationship. However, as with current customers, this information is not disclosed to third parties, except as permitted by law and outlined in our Privacy Policy.

### ***Confidentiality and Security***

We restrict access to nonpublic personal information about our clients to those employees and agents who need to know that information to provide products and services to our clients. We maintain physical, electronic and procedural safeguards to protect our clients' nonpublic personal information. We respect and value that you have entrusted us with your private financial information, and we will work diligently to maintain that trust. We are committed to preserving that trust by respecting your privacy as provided herein.

If you have any questions regarding this privacy notice, please contact us.

*Ted Guerin*

Blueprint Financial Consultants  
2750 NE 30th Avenue  
Portland, Oregon 97212  
503-381-0638  
[www.blueprint-fc.com](http://www.blueprint-fc.com)