

Blueprint Wealth Management, Inc. ("Blueprint" is registered with the United States Securities and Exchange Commission as a Registered Investment Adviser. Brokerage and investment advisory services and fees differ and it is important for the retail investor to understand the differences.

Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers, and investing.

What investment services and advice can you provide me?

We offer investment advisory services to retail investors. Our principal services, accounts, or investments we make available to retail investors are Financial Planning and Investment Management. We monitor investment management accounts periodically. We may review your accounts more frequently under abnormal market conditions, due to changes in your goals or objectives, tax law changes, or other specific requests.

We request discretionary authority to provide us authority to choose the securities to purchase or sell and the quantities to purchase or sell. This authority is granted through your signature on a portion of our investment advisory agreement.

We have no minimum account size.

Additional information about our services is included in our Form ADV 2A Items 4 and 7, which is available here: <https://adviserinfo.sec.gov/firm/summary/325099>

Ask your financial professional:

- **Given my financial situation, should I choose an investment advisory service? Why or why not?**
- **How will you choose investments to recommend to me?**
- **What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?**

What fees will I pay?

Your advisory fee is based on a percentage of your assets under management, and is paid from your accounts monthly, in arrears. The higher the value of your advisory account(s), the more you will pay in fees, however, as the value of your account(s) reach breakpoints, the annual percentage you pay will decrease. Therefore, we have an incentive to encourage you to increase the assets in your account, keeping in mind your risk tolerance and objectives.

In addition to this fee, you may be charged by the custodian of your assets for transactions in your accounts, margin fees, custodial fees, or other charges as detailed separately for you on your custodial account application. You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

For more detailed information, please review Form ADV 2A, specifically Item 5, available here: <https://adviserinfo.sec.gov/firm/summary/325099>

Commented [EG1]: Replace with "We monitor wealth management accounts, investment management accounts, and employee-retirement accounts periodically."

Commented [EG2R1]: Actually we want it to say what we said above but "...under management, is paid from your accounts quarterly, in arrears.

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Commented [EG4]: s - the more you will pay in fees

Commented [EG5]: , however, as assets hit breakpoints, the annual percentage rate charge will decrease.

Commented [EG6]: ADVwebsite link is <https://sanctuarywealthmanagement.com/wp-content/uploads/2020/06/ADV-Part-2.pdf>

Ask your financial professional:

- **Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs, and how much will be invested for me?**

What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we must act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here are some examples to help you understand what this means.

Advisors of the firm may make recommendations of different securities to each client or the same securities owned by an advisor which may be considered a conflict of interest. Advisors may recommend outside firms, companies, or professionals which may also create a conflict of interest.

Ask your financial professional:

- **How might your conflicts of interest affect me and how will you address them?**

For more information about our conflicts of interest, please review our Form ADV Part 2A, available here:

<https://adviserinfo.sec.gov/firm/summary/325099>

How do your financial professionals make money?

Our financial professionals are paid a salary that may or may not be based on assets or accounts serviced. Those financial professionals who are also owners receive additional compensation based on percentage of ownership and profitability of the firm.

Our financial professionals do not:

- Charge commissions
- Earn non-cash compensation
- Charge performance fees

Do you or your financial professionals have legal or disciplinary history?

Yes. You should visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Ask your financial professional:

- **As a financial professional, do you have any disciplinary history?**
- **For what type of conduct?**

For more information about our investment advisory services, or to request a copy of this Customer Relationship Summary or our Form ADV Part 2, please contact us at 410-992-4500

Ask your financial professional:

- **Who is my primary contact person?**
- **Is he or she a representative of an investment adviser or a broker dealer?**
Who can I talk to if I have concerns about how this person is treating me?