

Social Media Important Information

Blueprint Financial Advisors and certain of its affiliates maintain official social media accounts on platforms including LinkedIn, Facebook, X (formerly Twitter), and YouTube (collectively, the “Platforms”). In addition, certain Associated Persons of Blueprint Financial Advisors maintain approved business-related social media accounts, where permitted, which are supervised in accordance with firm policies and applicable securities laws and regulations.

The following important information applies to Blueprint Financial Advisors’ official social media accounts and approved Associated Persons business accounts.

A. Definitions

For purposes of this disclosure:

1. **“Platforms”** mean LinkedIn, Facebook, X (formerly Twitter), and YouTube, and any other social media platform on which Blueprint Financial Advisors maintains an official presence.
2. **“Blueprint Financial Advisors”** means Blueprint Financial Advisors and its affiliated entities that maintain official social media accounts.
3. **“Firm Accounts”** means official social media accounts maintained by Blueprint Financial Advisors.
4. **“Associated Persons Accounts”** means approved and supervised business-related social media accounts maintained by certain Associated Persons of Blueprint Financial Advisors in accordance with firm policies.
5. **“Users”** means individuals or entities who access, view, or interact with Firm Accounts and Associated Persons Accounts.
6. **“Interaction”** means any engagement with content on Firm Accounts or Associated Persons Accounts, including reactions, likes, comments, shares, reposts, direct messages, or other available social media features. The inclusion of a communication feature within the definition of “Interaction” does not mean that the feature is an approved business communication channel or Blueprint Financial Advisors, its affiliates or Associated Persons are authorized to conduct business through that feature.

B. General Information

1. No Affiliation with Social Media Platforms

Blueprint Financial Advisors is not affiliated with, sponsored by, or endorsed by any social media platform. Blueprint Financial Advisors is not responsible for the content, security, availability, privacy practices, or terms of use of any social media platform or any third-party content appearing on such platforms.

2. Monitoring and Recordkeeping

Communications made through Firm Accounts and Associated Persons Accounts may be monitored, reviewed, supervised, retained, and archived in accordance with applicable law, regulatory requirements, and firm policies. Such communications may be produced in response to regulatory requests, legal process, or other lawful governmental inquiries. Users should avoid posting or transmitting confidential, sensitive, or account-specific information through social media.

3. Privacy

Any personal information submitted through a social media platform is also subject to that platform's privacy policies and terms of use. Blueprint Financial Advisors' collection and use of personal information is governed by its Privacy Policy and other applicable privacy disclosures.

4. Customer Service, Account Instructions, and Complaints

Social media, including comments, messaging features, and direct messages, is not a secure method for communicating personal, confidential, account-specific, or time-sensitive information.

Blueprint Financial Advisors supervises, reviews and retains social media communications in accordance with applicable regulatory requirements and firm policies; however, Blueprint Financial Advisors may not receive, review, or respond to every message submitted through social media. Nothing in this disclosure limits a user's right to submit complaints or communicate with regulators through any legally available means.

Users should not use social media to:

- provide trading or investment instructions;
- request transactions, distributions, transfers, money movements, or account changes;
- submit time-sensitive requests; or
- communicate personal, confidential, or account-specific information.

Users who need assistance with their accounts should contact their Financial Professional or Blueprint Financial Advisors through established customer service channels.

C. Content and Communications

1. Informational Purposes Only

Content made available through Firm Accounts and Associated Persons Accounts is provided for general informational and educational purposes and speaks only as of the date published. Content may be changed or removed without notice and may become outdated as market, legal, regulatory, or other conditions change. Users should not assume that previously published information remains current. Past performance does not guarantee future results. Any performance presented is subject to applicable regulatory requirements and should be considered together with all accompanying disclosures and information necessary to understand the basis for the performance presented.

2. No Investment, Legal, or Tax Advice

Content published on Firm Accounts and Associated Persons Accounts is not intended to constitute, and should not be relied upon as investment, legal, tax, accounting, or other professional advice. Nothing contained in these accounts constitutes an offer to sell or a solicitation of an offer to buy any security, investment advisory service, or other product where such offer or solicitation would be unlawful. Investment decisions should be made based on an individual's specific financial circumstances, objectives, and risk tolerance, and where appropriate, after consultation with qualified professionals.

3. Third-Party Content

Firm Accounts and Associated Persons Accounts may include, share, or link to content created by third parties. Unless expressly stated otherwise, Blueprint Financial Advisors does not adopt, endorse, approve, or guarantee the accuracy, completeness, or reliability of third-party content, and the inclusion of such content should not be interpreted as an endorsement or recommendation.

4. Third-Party Interactions

Unsolicited comments, reactions, follows, shares, mentions, or other interactions posted by third parties are created by those third parties, have not been verified by Blueprint Financial Advisors, and do not necessarily reflect the views of Blueprint Financial Advisors. Unless expressly stated otherwise, such interactions should not be interpreted as endorsements by Blueprint Financial Advisors of any person, product, service, or viewpoint. Blueprint Financial Advisors may remove content or restrict participation under neutral, pre-established moderation standards, including standards addressing spam, unlawful or threatening content, confidential information, impersonation, infringement, deceptive content, or unrelated solicitation, and in a manner consistent with applicable recordkeeping and supervisory requirements. Blueprint Financial Advisors' decision not to remove particular third-party content should not be understood as its approval or endorsement of that content. A user's decision to follow, connect with, like, share, or otherwise interact with Blueprint Financial Advisors or its Associated Persons should not be construed as an indication of the User's experience with or endorsement of Blueprint Financial Advisors or its services.

5. Testimonials, Endorsements, and Third-Party Ratings

Where testimonials or endorsements are used in a manner subject to applicable securities laws and regulations, Blueprint Financial Advisors will provide all disclosures required by law, including, where applicable, disclosures regarding whether the person providing the testimonial or endorsement is a client, whether compensation was provided directly or indirectly, and any material conflicts of interest. Testimonials and endorsements are not a guarantee of future performance or success, are not necessarily representative of the experience of all clients, and should not be construed as a guarantee that any current or prospective client will achieve similar results or have a similar experience.

Any award, ranking, or third-party rating used by Blueprint Financial Advisors will be accompanied by any disclosures required under applicable law or regulation, including, where applicable, the identity of the rating provider, the date of the rating, the period upon which the rating was based, whether compensation was provided in connection with obtaining or using the rating, and any other required disclosures.

6. Forward-Looking Statements and Market Information

Market commentary, opinions, estimates, forecasts, and forward-looking statements reflect the judgments as of the date published and are subject to change without notice. There is no assurance that any projections or expectations will be realized.

7. No Warranty; Limitation of Liability

Although Blueprint Financial Advisors believes information contained in its Firm Accounts and Associated Persons Accounts is obtained from sources believed to be reliable, it makes no representations or warranties, express or implied, regarding the accuracy, completeness, timeliness, or suitability of any information provided. To the fullest extent permitted by applicable law, Blueprint Financial Advisors disclaims liability for losses arising from reliance on information contained on its social media accounts. Nothing in this disclosure is intended to limit any rights or remedies that cannot be waived under applicable federal or state securities laws.

8. No Offers Where Prohibited

Not all products or services are available in all jurisdictions or to all investors. Nothing contained in these accounts constitutes an offer to sell or a solicitation of an offer to buy any security or investment advisory service in any jurisdiction where such offer or solicitation would be unlawful.