

# Form ADV Part 3 – Client Relationship Summary

Date: 04/25/2021

## Item 1: Introduction

Blueprint Partners, LLC is an investment advisor registered with the Securities and Exchange Commission offering advisory accounts and services. Brokerage and investment advisory services and fees differ, and it is important that you understand the differences. This document gives you a summary of the types of services and fees we offer. Please visit [www.investor.gov/CRS](http://www.investor.gov/CRS) for free, simple tools to research firms and financial professionals, as well as educational materials about broker-dealers, investment advisors and investing.

## Item 2: Relationships and Services

*Questions to ask us: 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 investment services and advice can you provide me? Our firm primarily offers the following investment advisory services to retail clients: portfolio management (we review your portfolio, investment strategy and investments); financial planning (we assess your financial situation and provide advice to meet your goals); solicitor/selection of other advisors (we select Envestnet, a third party investment advisor, for you to use). As part of our standard services, we monitor client accounts on an annual basis. Our firm offers non-discretionary services, where the retail investor makes the ultimate decision regarding the purchase or sale of investments. We generally do not limit the types of investments that we recommend. We do however prohibit the solicitation of penny stocks, private non-traded securities and cryptocurrency. Our firm does not have a minimum account size. Please also see our Form ADV Part 2A ("[Brochure](#)"), specifically Items 4 & 7.

## Item 3: Fees, Costs, Conflicts and Standard of Conduct

*Questions to ask us: 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? How might your conflicts of interest affect me, and how will you address them?*

What fees will I pay? Our fees vary depending on the services you receive. Additionally, the amount of assets in your account affects our advisory fee; the more assets you have in your advisory account, the more you will pay, and thus we have an incentive to increase those assets in order to increase our fee. Asset-based portfolio management fees are paid in advance and withdrawn directly from the client's accounts on a quarterly basis with the client's written authorization. Fees for selection of Envestnet as a third-party advisor are withdrawn directly from the client's accounts by Envestnet with the client's written authorization. Envestnet will then pay Blueprint the portion of the fees earned. Fees are paid quarterly in advance. You pay our fees even if you do not have any transactions. The advisory fee paid to us generally does not vary based on the type of investments selected. Our fixed fee arrangements are based on the amount of work we expect to perform for you, so material changes in that amount of work will affect the advisory fee we quote you. Fixed financial planning fees are paid 100% in advance, but never more than six months in advance. Financial planning fees are paid via check and wire. Please also see Items 4, 5, 6, 7 & 8 of our [Brochure](#).

Some investments (e.g., mutual funds, exchange traded funds, etc.) impose additional fees (e.g., transactional fees and product-level fees) that reduce the value of your investment over time. The same

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goes for any additional fees you pay to a custodian. Additionally, you will pay transaction fees, if applicable, when we buy or sell an investment for your account. **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.** Please also see our [Brochure](#) for additional details.

What are your legal obligations to me when acting as my investment advisor? How else does your firm make money, and what conflicts of interest do you have? When we act as your investment advisor, we are legally obligated to act in your best interest and not put our interests 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 to you. Here are some examples to help you understand what this means:

- For AUM fees, the more assets you have in your advisory account, the more you will pay us and thus we have an incentive to increase those assets in order to increase our fee
- For fixed fees, the more work we expect to perform for you, the higher our fee would be and thus we have an incentive for you to agree to have us complete more work for you

How do your financial professionals make money? Primarily, we and our financial professionals receive cash compensation for the advisory services we provide to you from the advisory fees we receive from you. This compensation may vary based on different factors, such as those listed above. Please also see Item 10 of our [Brochure](#) for additional details.

## Item 4: Disciplinary History

*Questions to ask us: As a financial professional, do you have any disciplinary history? For what type of conduct?*

Do you or your financial professionals have legal or disciplinary history? No, we do not have legal or disciplinary events. Visit <https://www.investor.gov/> for a free, simple search tool to research us and our financial professionals.

## Item 5: Additional Information

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

Your primary contact is the Investment Advisor Representative who signed the Investment Advisory Contract with you. The Investment Advisor Representative is affiliated with Blueprint Partners, LLC, a Registered Investment Advisor. Should you have any concerns you may contact the Chief Compliance Officer, Christopher Millward, at [chris@blueprint.family](mailto:chris@blueprint.family) or 231-668-9519.

For additional information on our advisory services, see our [Brochure](#) available at <https://adviserinfo.sec.gov/firm/summary/312902> and any individual brochure supplement your representative provides. If you have any questions, need additional information or want another copy of this Client Relationship Summary, please contact us at 231-668-4147.

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## Exhibit A - Material Changes to Client Relationship Summary

This is the initial version of the Client Relationship Summary. There are no material changes.