

# PRIVACY POLICY

## **What does Blue Point Strategic Wealth Management, LLC (“Blue Point”) do with your personal information?**

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number
- Assets
- Account Transactions
- Employment Information
- Income
- Investment Experience

When you are no longer our customer, we continue to share your information as described in this notice.

All financial companies need to share customers’ personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information; the reasons Blue Point chooses to share; and whether you can limit this sharing.

### **Reasons we can share your personal information:**

Blue Point shares your information for the following reasons and you cannot limit this sharing.

- For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus.
- For our marketing purposes— to offer our products and services to you.
- For joint marketing with other financial companies.
- For our affiliates’ everyday business purposes— information about your transactions and experiences.

Blue Point does not share your information for the following reasons:

- For our affiliates' everyday business purposes— information about your creditworthiness.
- For non-affiliates to market to you.

### **Who is providing this notice to you?**

Blue Point Strategic Wealth Management, LLC

### **How does Blue Point protect my personal information?**

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

### **How does Blue Point collect my personal information?**

We collect your personal information, for example, when you

- Open an account
- Provide employment information
- Provide account information
- Give us your income information
- Give us your contact information

We also collect your personal information from others, such as affiliates, custodians, or other companies.

### **Why can't I limit all sharing?**

Federal law gives you the right to limit only:

- Sharing for affiliates' everyday business purposes—information about your creditworthiness
- Affiliates from using your information to market to you sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

### **Definitions**

Affiliates - Companies related by common ownership or control. They can be financial and nonfinancial companies.

Blue Point Strategic Wealth Management, LLC affiliates include:

- Nationwide Planning Associates, Inc.
- NPA Asset Management, LLC
- NPA Insurance Agency, Inc.
- Abramenko & Company, Inc.

Non-affiliated - Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- Blue Point does not share with non-affiliates so they can market to you.

Joint Marketing - A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- Blue Point has marketing partners that include other financial services companies.

Other important information

This notice applies to all prospective, current and former business partners, investment professionals and clients. This notice replaces all previous notices of our consumer privacy policy, and may be amended at any time. We will keep you informed of changes or amendments as required by law.

Call (201) 690-3057. If we serve you through an investment professional, please contact them directly. Specific mailing addresses and telephone numbers are listed on your statements and other correspondence.