

**Strategic Blueprint, LLC** (the “Firm”) is registered with the Securities and Exchange Commission (SEC) as an investment adviser. Brokerage and investment advisory services and fees differ, and it is important for you to understand these differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](http://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, including investment management, financial planning, financial and investment consulting, and family offices services. The services provided to you, including ongoing monitoring and updates to plans, are agreed upon between you and your Advisory Representative, and described in the Advisory Agreement. We will recommend stocks, bonds, mutual funds, ETFs, non-traded securities, private offerings, and/or portfolios managed by unaffiliated third-party sub-advisers, based on your stated financial profile. Generally, the Firm requires a minimum of \$25,000 to open a managed account. If agreed to in writing by you, accounts can be managed on a discretionary basis. Discretion is limited to the selection, amount, and timing of the purchase and sale of securities in the account. Discretion does not allow the transfer of cash or securities out of your account. The discretionary authority can be revoked in writing by you at any time. If your accounts are managed on a nondiscretionary basis, then you will make the ultimate decisions regarding the purchase and/or sale of investments.

Some of our Advisory Representatives are also registered with our affiliate, The Strategic Financial Alliance, Inc. (SFA) in order to offer brokerage services and commission products., separate from our advisory services. You will receive a copy of SFA’s Form CRS if you are also a client of SFA and if your Advisory Representative makes recommendations to you in the role of an SFA representative.

**For additional information about our services**, please see Form ADV Part 2A Brochure, Items 4 and 7, or Part 2A Appendix 1, Items 4 and 5. Please refer to your Advisory Representative’s ADV Part 2B Supplement Brochure which describes the particular services she or he will offer on behalf of Strategic Blueprint.

**Ask your Advisory Representative –**

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- *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?**

The Firm assesses a negotiated fee for investment management based on the value of the assets in your account. This fee is charged in arrears monthly or quarterly, as agreed to by you. When an asset-based fee is charged, the more assets in your account, the more fees you will pay and the more we will earn. The Firm may therefore have an incentive to encourage a retail investor to increase the assets in his or her account. The Firm offers wrap and non-wrap fee programs. In a wrap fee, most transaction fees are covered by the advisory fee paid to the firm; therefore, the wrap fees may be higher than similar services in a non-wrap program. In a non-wrap program, you will pay the transaction fees charged by the account custodian. The advisory fee will not include custodial fees, account maintenance fees, alternative investment custodial fees, underlying expenses of mutual funds, variable annuities, and other investment securities. Fees charged by the account custodian are disclosed in your account opening documents. The underlying fees associated with mutual funds, ETFs and certain other investments are disclosed in their offering documents. You will pay fees and costs whether you make or lose money on your investment. 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.

Fees for Financial Planning, Consulting, Subscription Services and Family Office Services may be hourly, flat fee, or asset based, and are negotiated with your Advisory Representative. The fees applicable to each service are described in your Advisory Agreement.

**For additional information**, please see *Form ADV Part 2A Brochure*, Items 4 and 7, and *Appendix 1*, Items 4 and 5. Please see SFA’s Form CRS for information about its fees.

**Ask your Advisory Representative –**

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- *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 have a fiduciary duty to 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 affect the recommendations, we provide you. Here are some examples to help you understand what this means.

The firm charges fees for the advisory services delivered to you. Some product sponsors and asset managers contribute financial support for conferences, education, and training for Advisory Representatives, as well as support for client education and appreciation events conducted by Advisory Representatives. Custodians make software, education, and other products available at no or discounted charges to help us service your accounts. If your Advisory Representative is also registered with SFA, she or he will earn commissions if you purchase securities through SFA. If your Advisory Representative is a licensed insurance agent, she or he will earn commissions if you purchase insurance through her or him.

**For more detailed information** about conflicts of interest, please refer to our *Form ADV, Part 2A Brochure* Items 10 and 14, *Appendix 1, Item 9, "Client Referrals and Other Compensation*, and your Advisory Representative's *Part 2B Supplement*, and the *Sources of Financial Benefits to Strategic Blueprint*..

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**Ask your Advisory Representative –**

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

**How do your financial professionals make money?**

Our advisory representatives earn all or a portion of the fees charged for the services provided. The fees you are charged are negotiated by you with your advisory representative, and will be based on many factors, including the complexity of the services, the amount of your assets, the time involved, and your relationship. Some advisory representatives are also registered with SFA. Your advisory representative will earn commissions when offering products and services as a registered representative of SFA. Timbrel Capital LLC, another affiliate of the Firm, helps investment product sponsors bring their products to market, for which it earns compensation. We may recommend products distributed by Timbrel Capital. Your advisory representative earns options for ownership in the Firm's parent company. The value of those options as well as that of the parent company is enhanced by the revenues of the Firm and its affiliates. Certain advisory representatives are licensed insurance agents and will earn commissions if you purchase insurance through them. Additionally, your advisory representative will benefit when product sponsors and vendors support conferences, due diligence trips, and educational events for financial professionals. Your Advisory Representative's ADV Part 2B Supplement will disclose if she or he is registered with SFA, is a licensed insurance agent, if he is a shareholder of the parent company, as well as other business activities.

**Do you or your financial professional have legal or disciplinary history?**

The Firm does not but certain advisory representatives have disclosable disciplinary history which can be found in the representative's ADV Part 2B Supplement or at [www.advisorinfo.sec.gov](http://www.advisorinfo.sec.gov) by entering the name of the representative. A free and simple search tool to research the Firm and your representative is available at [www.Investor.gov/CRS](http://www.Investor.gov/CRS) .

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**Ask your Advisory Representative –**

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

**For additional information** about the Firm and your advisory representative visit [www.advisorinfo.sec](http://www.advisorinfo.sec). You can find the most current Customer Relationship Summary, Form ADV Part 2A Brochures, and additional disclosures about the Firm under [Disclosures](#) at [www.strategicblueprint.net](http://www.strategicblueprint.net), or you can call Strategic Blueprint Client Services at 678.954.4130 or email to [clientservices@strategicblueprint.net](mailto:clientservices@strategicblueprint.net).

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**Ask your Advisory Representative –**

- *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?*

