BluePrint Investing LLC - Form CRS June 16, 2026

BluePrint Investing LLC ("we," "our," or "us") is registered with the Securities and Exchange Commission 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, 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 such as you primarily through the management of your separate account. As part of our standard services, we monitor each account on an ongoing basis and we typically furnish clients with portfolio holdings/performance reports on a quarterly basis. Our authority to manage a retail investor's account is usually discretionary, which means that you authorize us to select the identity and amount of securities to be bought or sold, subject to your chosen strategy and stated investment objectives. On occasion, we agree to manage accounts on a non-discretionary basis, which means that we must obtain the client's consent prior to placing client assets in certain types of investment vehicles. BluePrint will implement asset allocation strategies with exchange-traded funds ("ETFs"), mutual funds, publicly traded equities, and/or other securities. For certain investment strategies, and in close coordination with the client, we utilize third-party investment advisers (sub-advisers). We may also recommend, in close coordination with the client, private funds managed by third parties. We generally require a minimum portfolio size of $5 million, which may be reduced or waived at our discretion. Limitations on investments typically include limitations by plan sponsors, mutual fund selections of no-load or waived load funds, and any client-imposed restrictions. We also provide financial planning at no additional cost, which includes advice regarding the investment, management, and use of financial resources based upon an assessment of a client's individual situation and goals.

Additional Information: *Please also see Items 4, 7, 13, and 16 of Form ADV, Part 2A.*

Conversation Starters - 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?

We charge a fee based on the total assets in your account. This fee, which is payable quarterly in advance, is calculated from the following sliding fee schedule: we charge an annual rate of 0.85% on the first $2 million, 0.65% on the next $3 million, 0.50% on the next $5 million, and 0.30% on amounts over $10 million in your account. We generally require a minimum fee of $9,125 per quarter for advisory services, which can be waived or reduced at our discretion. The more assets there are in your account, the more you will pay in fees, and we may therefore have an incentive to encourage you to increase the assets in your account. Our fee does not include (and you will pay separately) any applicable charges imposed by custodians, brokers and other third parties such as brokerage commissions, transaction fees, custodial fees, wire transfer and electronic fund fees, and other fees and taxes on your account and on the securities transactions in your account. Mutual funds, private funds, and ETFs also charge their own internal management fees. Fees for sub-advisory services vary with each sub-adviser utilized and are separate and in addition to the fees that we charge.

Additional Information: 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 Item 5 of Form ADV, Part 2A*.

Conversation Starter - 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 have 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 can affect the investment advice we provide you. Here are some examples to help you understand what this means. For instance, we have an incentive to advise against withdrawing funds from your account to pay a mortgage or purchase real estate so that our compensation does not decrease. Additionally, Schwab Advisor Services ("Schwab") and Fidelity Institutional Wealth Services ("Fidelity") make an economic benefit available to us in the form of the support products and services they generally make available to independent investment advisers whose clients maintain their accounts at Schwab/Fidelity. These products and services, and the conflicts of interest they create if/when we utilize them, are described further in Item 12 of our Form ADV, Part 2A brochure. We do not base particular investment advice, such as buying particular securities for our clients, on the availability of Schwab's/Fidelity's products and services to us.

Additional Information*: Please also see Items 10-12, and 14 of Form ADV, Part 2A.*

Conversation Starter - Ask your financial professional:

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

How do your financial professionals make money?

Firm owners are compensated by distributions based on firm ownership. Other professionals are compensated by salary.

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

No, we do not. You may visit Investor.gov/CRS for a free and simple search tool to research us and our financial professionals.

Conversation Starter - Ask your financial professional:

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

You can find additional information about us and our advisory services at https://blueprintinvest.com/ and https://adviserinfo.sec.gov/. If you would like up-to-date information and/or a copy of this relationship summary, please call (415) 963-9815.

Conversation Starter - 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?**