



Blue Point Privacy Policy

Blue Point Investment Management, LLC (BPIM), an independent investment advisory firm, is committed to safeguarding the confidential information of its clients. We recognize the importance of protecting your personal information and take the responsibility of handling your personal information extremely seriously. As a regulated investment advisor, BPIM is required to obtain certain personal information from our customers. BPIM limits the collection, use and retention of your personal information to the extent needed to properly administer your account.

On a confidential basis we may disclose nonpublic information to third parties that perform account maintenance and processing services for us. These include our broker dealer and custodian. We may also disclose nonpublic personal information to nonaffiliated third parties as required by law or as authorized by you. These parties include government/regulatory organizations, including but not limited to the State of Maryland, the Securities and Exchange Commission, the Internal Revenue Service and to parties under court order or subpoena that request this information.

BPIM restricts your account information to those employees who need to know that information to service your account. We do not provide your personal information to mailing list vendors or solicitors for any purpose. Personal information about you will be maintained during the time you are a client and for the required time thereafter that such records are required to be maintained by federal and state securities laws.

Please contact the portfolio manager, Niall H. O'Malley at 443-600-8050, if you have any questions. As always we appreciate your trust and confidence and the opportunity to provide you with our services.