



ANNUAL PRIVACY NOTICE

BlueDoor Private Wealth, LLC ("We") is an independent investment advisory firm that is committed to safeguarding the confidential information of our clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information that we collect from you in connection with investment management services that we provide to you. We never disclose information to unaffiliated third parties, except after receiving your express written permission, or as required by law, and have no intentions of doing so in the future. We use financial information that you provide to us to help you meet your personal investment objectives while safeguarding that information against any infringements of your rights of privacy. Our policy with respect to personal information about you is listed below.

- The categories of nonpublic personal information that we collect from a client depend upon the scope of the investment management services and its related advisory agreement. It will include information about your goals and risk tolerance, and other related information. It may include information about your family, your finances, your employment and/or business, and information about your health (to the extent it is relevant to your investments). It may also include information about transactions between you and third parties.
- We limit employee and agent access to information only to those who have a business or professional reason for knowing, and only to unaffiliated parties as required or permitted by law.
- BlueDoor maintains a Trusted Contact Policy. During the initial account setup process, it is the policy of the Firm to request the completion of a Trusted Contact Form ("Form") for all clients age 65 or older. Completion of this Form authorizes BlueDoor to provide your personally identifiable information (including your account information and securities holdings) to your trusted contact. Note, this is a request only. Should a client decline to complete the Form or not respond to such request, BlueDoor will document as such.
- We maintain a secure office and computer environment to ensure that your information is not placed at unreasonable risk.
- For unaffiliated third parties that require access to your personal information, including financial service companies, consultants, and auditors, we also require strict confidentiality in our agreements with them and expect them to keep this information private. Federal and state regulators also may review firm records as permitted or required by law.

- We do not provide any of your personal information to mailing list vendors or solicitors and never intend to do so.
- Personally identifiable 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. After this required period of record retention, all such information will be destroyed.

If, at any time in the future, it is necessary to disclose any of your information in a way that is inconsistent with this policy, we will give you advance notice of the proposed change so that you will have the opportunity affirmatively consent of such disclosure.

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