BLUE CHIP PARTNERS, INC.
Independent Investment Advisory Firm
DELEGATE CONFIDENTLY™
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Privacy Notice

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Your Privacy is Important to Us

One of our top priorities is to make sure that we keep the information we have about you secure. We value our relationship with you. We work hard to preserve your privacy. The very nature of our relationship with you requires us to collect or share certain types of information about you. This privacy notice explains how we use potential, current and former customer information. Please read it carefully.

What Personal Information Do We Have?

We collect information, such as name, address, social security number, assets, income or employment status, that we need to in order to provide the services you request and to administer your relationship with us. We may also collect health information as you authorize. We may collect information from:

- You during face-to-face meetings and telephone conversations;
- You when you complete an application, a fact-finder for financial planning, or other form;
- Your employer in connection with its sponsoring and administering of your retirement plan;
- Your business dealings with any Custodian or Broker/Dealer; or
- Any product or service provider; if you approve our discussing or obtaining information on your behalf (for example, discussions with your tax preparer or attorney).

How do we use your Personal Information?

We use your personal information described above and may provide it to others:

- To perform services on your behalf;
- To process your requests and transactions; or
- To fulfill legal and regulatory requirements.

We use cloud-based internet software programs to store and manage client information, and to provide portfolio management and reporting services. Our use of these programs is subject to strict confidentiality agreements and strong security protection procedures to protect the security and confidentiality of client information.

We may be required to share personal information with the custodian of your accounts. In other cases, we may disclose or report personal information in limited circumstances where we believe in good faith that disclosure is required or permitted under law. For example, we may be required to disclose personal information to cooperate with regulators or law enforcement authorities, to resolve consumer disputes, to perform credit/authentication checks, or for institutional risk control. All information will remain confidential.

Protecting the Confidentiality of Your Personal Information

Employees of Blue Chip Partners have access to your personal information in order to provide products or services to you. Individuals who have access to your personal information are required to keep it strictly confidential. We maintain safeguards to protect your personal information, including Blue Chip Partners' Code of Ethics which all employees are required to review and acknowledge in writing annually. We will never sell your information.

We reserve the right to change this Privacy Policy at any time without prior notification. Please contact us at 248-848-1111 for additional information.