



PRIVACY STATEMENT

Blankinship & Foster, LLC is an independent financial advisory firm and is committed to keeping the confidential information provided to our firm in the strictest confidence.

The quality of our financial advice and guidance depends on receiving current and accurate financial and personal information from our clients. We will protect the personal confidential information you have provided in a manner that is safe, secure and professional. Blankinship & Foster, LLC and its employees are committed to protecting your privacy and to safeguarding that information.

Safeguarding Client Confidential Information

To ensure that our client's confidential information is always protected, we have developed protective policies and procedures that require administrative, technical, and physical safeguards to access the information.

Information We Collect

As part of administering clients' accounts, and performing financial planning and investment management functions, we collect confidential client information. Examples include, tax returns, account statements, and legal documents.

Our Practices on Sharing Confidential Information

Blankinship & Foster, LLC is committed to the protection and privacy of its clients' and consumers' personal and financial information. We will not share such information with any affiliated or nonaffiliated third party except:

- When necessary to complete a transaction in a client account, such as with the clearing firm or account custodians;
- When required to maintain or service a client account;
- To resolve client disputes or inquiries;
- With persons acting in a fiduciary or representative capacity on behalf of the client;
- With rating agencies, persons assessing compliance with industry standards, or to the attorneys, accountants and auditors of the firm;
- In connection with a sale or merger of Blankinship & Foster, LLC;
- To protect against or prevent actual or potential fraud, identity theft, unauthorized transactions, claims or other liability;
- To comply with federal, state or local laws, rules and other applicable legal requirements;

- In connection with a written agreement to provide investment management or advisory services when the information is released for the sole purpose of providing the products or services covered by the agreement;
- In any circumstances with the client's instruction or consent; or
- Pursuant to any other exceptions enumerated in the California Information Privacy Act.

Opt-Out Provisions

It is our policy NOT to share nonpublic personal and financial information with affiliated or unaffiliated third parties except under the circumstances noted above. Since sharing under the circumstances noted above is necessary to service client accounts or is mandated by law, there are no allowances made for clients to opt out of these types of communications.

Communications of a non-account related nature, such as our newsletter or event invitations, are not shared with any non-affiliated or affiliated third parties, and generally do not include non-public information. However, an "Unsubscribe" feature is included which allows the reader to opt out of future communications.

European Union General Data Protection Regulation (GDPR) Privacy Notice

(This section pertains to individuals in the European Economic Area (EEA))

We collect personal data as part of our investment management and financial planning services.

Your GDPR Rights:

1. You have the right to obtain access to your personal data.
2. You have the right to ask for incorrect, inaccurate, or incomplete personal data to be corrected.
3. You have the right to request that personal data be erased.
4. You have the right to request restriction of processing of your personal data in specific cases.
5. You have the right to object to the processing of your personal data for marketing purposes.
6. You have the right to receive your personal data in a machine-readable format.
7. You have the right to withdraw consent from our direct marketing.
8. You have the right to lodge a complaint with a Supervisory Authority of your Member State.

You can exercise these rights by contacting our Data Protection Officer, Jon Beyrer at bf@bfadvisors.com.

If you have any questions about our privacy practices, or if you feel at any time that Blankinship & Foster, LLC is not abiding by this Privacy Statement, please contact us immediately at (858) 755-5166 or via email at bf@bfadvisors.com.