Effective Date: August 17, 2026

FACTS

WHAT DOES BLUESTONE STRATEGIC TAX DO WITH YOUR PERSONAL INFORMATION?

Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some, but not all, sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information.
What?	The types of personal information we collect and share depend on the services you receive from us. This information can include Social Security number and taxpayer identification information; tax returns, transcripts, income and account information; financial and investment information; business and ownership information; and information you provide in questionnaires, documents, communications, and meetings.
How?	All financial companies need to share customers' personal information to run their everyday business. The table below explains the reasons financial companies can share personal information, whether Bluestone Strategic Tax shares for those reasons, and whether you can limit that sharing.

Reasons we can share your personal information

Reasons we can share your personal information	Does Bluestone share?	Can you limit this sharing?
For our everyday business purposes - such as to provide tax planning and advisory services, process authorized tax data, maintain records, manage accounts, protect against fraud, respond to legal process, and use service providers that support our operations	Yes	No
For our marketing purposes - to offer our products and services to you	Yes	No
For joint marketing with other financial companies	No	We do not share
For our affiliates' everyday business purposes - information about your transactions and experiences	No	We do not share
For our affiliates' everyday business purposes - information about your creditworthiness	No	We do not share
For our affiliates to market to you	No	We do not share
For nonaffiliates to market to you	No	We do not share

Questions?

Contact Bluestone Strategic Tax at joe@bluestone-tax.com or 270 S Sparta Ave, Ste 104 #325, Sparta, NJ 07871.

Important tax-information notice. This notice does not constitute taxpayer consent under Internal Revenue Code Section 7216 or any IRS authorization. When a separate consent or authorization is required for a use, disclosure, or retrieval of tax return information, Bluestone will obtain it separately.

Who we are	What we do
ho is providing this notice?	Bluestone Strategic Tax provides this notice for the customer relationship covered by its tax planning and related advisory services.

What we do

How does Bluestone protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures designed to comply with applicable law. These measures include administrative, technical, and physical safeguards, access controls, workforce procedures, secure systems, and oversight of service providers appropriate to the information involved.
How does Bluestone collect my personal information?	We collect personal information, for example, when you engage us for tax planning or advisory services; give us tax returns, financial records, questionnaires, or other documents; communicate with us; or authorize us or a service provider to obtain information from the IRS or another source. We may also collect information from authorized professional advisers, financial institutions, payroll or plan providers, government agencies, and service providers.
Why can't I limit all sharing?	Federal law gives you the right to limit only certain sharing. Bluestone does not currently share nonpublic personal information with affiliates or nonaffiliated third parties for their own marketing in a manner that would require a federal opt-out. If our practices change so that an opt-out right applies, we will provide the required notice and choice before the new sharing begins.
What happens when I am no longer a customer?	When you are no longer our customer, we may continue to share your information as described in this notice and as permitted or required by law, including for recordkeeping, legal compliance, security, professional obligations, and ordinary service-provider functions.

Definitions

Affiliates	Companies related by common ownership or control. Bluestone does not currently share nonpublic personal information with affiliates for affiliate marketing.
Nonaffiliates	Companies not related by common ownership or control. They may include technology, hosting, scheduling, tax-data retrieval, tax research, AI-assisted, cybersecurity, document-management, and other service providers that perform services for Bluestone; professional advisers; and other persons when permitted or required by law.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. Bluestone does not currently engage in joint marketing that involves sharing your nonpublic personal information.

Other important information

This GLBA customer privacy notice supplements Bluestone's general website Privacy Policy. It does not replace any separate taxpayer authorization, Section 7216 consent, engagement agreement, or other notice or consent required for a particular service or disclosure. Bluestone may update this notice if its information-sharing practices materially change and will provide a revised notice when required by law.