

**Part 2B of Form ADV: *Brochure Supplement***

Richard Eller

**DBA: Blueprint Financial Group**

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Spire Wealth Management, LLC

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This brochure supplement provides information about Richard Eller that supplements the Spire Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Sue McKeown if you did not receive Spire Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Richard Eller is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov)



## Item 2 Educational, Background and Business Experience

**Full Legal Name:** Richard Eller

**Born:** 1961

### Education

- University of Rochester; BS; 1983

### Business Experience

- Spire Investment Partners, LLC; President - Eller Financial Group; from 2/4/2010 to current. Richard began his financial services career with Prudential in 1988.

### Business Description

Blueprint Financial helps add precision to your investment and retirement planning. We help you blueprint your personal plan to fund your retirement and any other financial obligations you may have. Whether you are planning to pay for a child's college education, your long and comfortable retirement or even purchase a beach house it all starts with a realistic discussion of cash flow planning, current investments and a well thought out plan.

We believe...

- Having a few scattered retirement accounts does not constitute a plan
- Cost- and tax-efficient growth of your investments is critical
- Retirement accounts may need to generate income for 30 years
- Most retirement accounts are subject to risk of market volatility
- Taxes, inflation and medical expenses can severely impact your retirement plan

We ask the right questions and engage in a serious conversation. We then create, execute and monitor your plan - your blueprint to succeed with your objectives with confidence. To that end, we employ some basic concepts:

#### Efficient investment management

- Low cost index shares
- Tax and cost sensitive ETF's
- Easily understood allocations
- Liquidity and transparency
- Frequent communication with you

Blueprint Financial Group charges investment advisory fees for the extensive work performed for each client, as shown on the monthly statement. We believe in clarity and transparency. There are no commissions charged.

We review our client portfolios on a regular basis, with an in-depth analysis implemented, on a consistent basis. Our team reviews and benchmarks investment accounts for total return, dividend yield and growth potential. We utilize industry resources and software to analyze performance and structure. We then communicate this to the client.

### **Item 3 Disciplinary Information**

Richard Eller has reportable disciplinary history, the details of which can be found by going to [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

### **Item 4 Other Business Activities**

#### **A. Investment-Related Activities**

1. Richard Eller is also engaged in the following investment-related activities:

Insurance company or agency

Licensed as an insurance representative allows the advisor to offer various insurance products. Typically these products generate commission payments to the representatives selling the products separately from the investment advisory services. The ability to offer these products to clients allows the advisor a much more robust suite of products and thereby providing the client with a much more comprehensive financial plan.

#### **B. Non Investment-Related Activities**

Richard Eller is not engaged in any other business or occupation that provides substantial compensation or involves a substantial amount of his or her time.

### **Item 5 Additional Compensation**

Richard Eller does not receive any economic benefit from a non-advisory client for the provision of advisory services.

### **Item 6 Supervision**

**Supervisor:** Andrew Baron

**Title:** Designated Supervisor

**Phone Number:** 703-657-6072

In addition to an annual in person review of our firms policies and procedures, each advisor is subject to the following ongoing supervision and review:

Daily trade reviews

Monthly review of personal securities accounts

Monthly correspondence reviews - including ongoing capture and review of email

Periodic reviews of client account activity

Montly review of business bank statements