Part 2B of Form ADV: Brochure Supplement



Michael Scott Bloom
CRD No. 2553778

for

Grosse Point Capital Management
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Evanston, IL 60201
CRD No. 310057

This brochure provides information about the qualifications and business practices of Grosse Point Capital Management. If you have any questions about the contents of this brochure, please contact us at (847) 550-7100 and/or michael@grossept.com.

The information in this brochure has not been approved or verified by the United States Securities and Exchange Commission ("SEC") or by any state securities authority. Additional information about Grosse Point Capital Management also is available on the SEC's website at www.adviserinfo.sec.gov.

Grosse Point Capital Management' registration as an investment adviser does not imply a certain level of skill or training.

Effective Date: August 16, 2026

SUPERVISED PERSONS: Michael Bloom, CFP®, ChFC®, CLU®, AEP®

ITEM 2 EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Name: Michael Scott Bloom, CFP®, ChFC®, CLU®, AEP®

Year of Birth: 1960

Education:
Bachelor of Arts in Political Science; 1982
University of Connecticut
Storrs, CT

Master of Business Administration, Marketing; 1986
The Ohio State University
Columbus, OH

Experience:
Managing Member
Grosse Point Capital Management
Evanston, IL
July 2020 - Present

Managing Director
Eusebius Advisors
Evanston, IL
February 2013 – July 2020

Wealth Management Advisor
Northwestern Mutual Investment Services LLC
Chicago, IL
May 2001 – January 2013

Professional Designations:
Certified Financial Planner (CFP®)
Chartered Financial Consultant (ChFC®)
Chartered Life Underwriter (CLU®)
Accredited Estate Planner (AEP®)

Certified Financial Planner (CFP®). The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the "CFP® marks") are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and several other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

Currently, more than 71,000 individuals have obtained CFP® certification in the United States. To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: (1) Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services and attain a bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning; (2) Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances; (3) Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and (4) Agree to be bound by CFP Board's Standards of Professional Conduct, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks: (1) Complete 30 hours of continuing education hours every two years, including two hours on the Code of Ethics and other parts of the Standards of Professional Conduct, to maintain competence and keep up with developments in the financial planning field; and (2) Renew an agreement to be bound by the Standards of Professional Conduct. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Chartered Life Underwriter® (CLU®). The CLU® designation is one of the oldest and most respected credentials in financial services, dating back to the late 1920's. It represents a thorough understanding of a broad array of personal risk management and life insurance planning issues and stresses ethics, professionalism, and in depth knowledge in the delivery of financial advice.

CLU® candidates must complete eight college-level courses, five required and three electives. The required courses include Fundamentals of Insurance Planning; Individual Life Insurance; Life Insurance Law; Fundamentals of Estate Planning; and Planning for Business Owners and Professionals. Elective topics cover financial planning, health insurance, income taxation, group benefits, investments, and retirement planning. Prerequisites include three years of full-time, relevant business experience. Designation holders must adhere to The American College's Code of Ethics, which includes the following professional pledge: "I shall, in light of all conditions surrounding those I serve, which I shall make every conscientious effort to ascertain and understand, render that

service which, in the same circumstances, I would apply to myself." The education requirement consists of passing eight closed-book, course-specific, two-hour proctored exams. 30 hours of continuing education are required every two years.

Accredited Estate Planner® (AEP®). The AEP® designation is a graduate-level specialization in estate AEP® (Accredited Estate Planner®) The AEP® designation is a graduate-level specialization in estate planning, obtained in addition to already recognized professional credentials within the various disciplines of estate planning who support the team concept of estate planning. It is awarded to estate planning professionals who meet stringent requirements of experience, knowledge, education, professional reputation, and character. Educational requirements are two graduate-level courses administered by The American College or from another accredited graduate program as part of a master's or doctoral degree unless applicant has 15 or more years' experience as an estate planner.

Candidates must meet all of the following requirements: Must be an attorney (JD), accountant (CPA), insurance professional or financial planner (CLU®, ChFC®, CFP® certificant) or trust officer (CTFA); must be in good standing with their professional organization, not be subject to disciplinary investigation, and provide three professional recommendations. Must be presently and significantly engaged in estate planning activities and have a minimum of five years' experience in estate planning in one or more of the prerequisite professions. AEP® designees must maintain membership in NAEPC. NAEPC's Code of Ethics is intended to align with those of the gateway professional designations required prior to earning the AEP®. View the NAEPC Code at http://www.naepc.org/codeofethics. Examination standards are those used by the accredited academic institution providing the graduate courses and include proctored, closed-book exams. Continuing education requirements are 30 hours every 24 months, including 15 hours in estate planning. Recertification required annually.

Chartered Financial Consultant (ChFC®). The ChFC® designation is offered by The American College. Designation holders are required to serve clients with the highest level of professionalism. The authority to use the ChFC® mark is granted by the Certification Committee of the Board of Trustees of The American College, and that privilege is contingent on adherence to strict ethical guidelines. All ChFC® advisors are required to do the same for clients that they would do for themselves in similar circumstances, the standard of ethical behavior most beneficial for their clients. Each ChFC® has taken 9 or more college-level courses on all aspects of financial planning. The average study time for the program is over 400 hours, and advisors frequently spend years earning this coveted distinction. Each ChFC® must also complete a minimum of 30 hours of continuing education every two years and must meet extensive experience requirements to ensure that you get the professional financial advice you need.

ITEM 3 DISCIPLINARY INFORMATION

There are no disciplinary events to disclose.

ITEM 4 OUTSIDE BUSINESS ACTIVITIES

At present, Mr. Bloom, in his individual capacity, is an insurance professional operating as a broker representing applicants to several insurance companies rather than an agent representing one. Mr. Bloom, in his capacity as an insurance professional, may recommend, on a fully disclosed commission basis, the purchase of certain insurance products. A conflict of interest exists to the extent that our firm recommends the purchase of insurance products where Mr. Bloom receives insurance commissions or other additional compensation. Our clients are not obliged to use the various insurance agencies Mr. Bloom may recommend when purchasing any insurance products.

Neither Grosse Point Capital Management nor any of its employees are registered, or have an application pending to register, as a broker-dealer or registered representative of a broker dealer, futures commission merchant, commodity pool operator, a commodity trading advisor, or an associated person of the foregoing entities.

ITEM 5 ADDITIONAL COMPENSATION

Mr. Michael Bloom may receive additional compensation in his capacity as an insurance professional for Grosse Point Insurance. Mr. Bloom does not receive any economic benefit from anyone who is not a client for providing advisory services.

ITEM 6 SUPERVISION

Mr. Bloom is the Managing Member and Chief Compliance Officer ("CCO") of our firm and as such has no internal supervision placed over him. He is, however, bound by our firm's Code of Ethics. The CCO may be contacted at (847) 550-7100 or by email at michael@grossept.com.

ITEM 7 REQUIREMENTS FOR STATE-REGISTERED ADVISERS

Michael Scott Bloom has not been involved or been found liable in any arbitration claims alleging damages of more than $2,500, in any civil, self-regulatory organization, or administration proceeding, or been subject of any bankruptcy petition.