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# FORM ADV PART 2B

## 2024



### BLUEFIN INVESTMENT MANAGEMENT, LLC

130 CORRIDOR RD. #241  
PONTE VEDRA BEACH, FL 32004

brian.russell@bluefininvest.com  
www.bluefininvest.com

This brochure supplement provides information about Brian Russell that supplements the Bluefin Investment Management, LLC brochure. You should have received a copy of that brochure. Please contact us at [brian.russell@bluefininvest.com](mailto:brian.russell@bluefininvest.com) if you did not receive Bluefin Investment's brochure or if you have any questions about the contents of this supplement.

Additional information about Bluefin Investment Management, LLC also is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

Bluefin Investment Management, LLC is considered a "registered investment adviser." That registration does not imply a certain level of skill or training.

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## **Item 2      Educational Background and Business Experience**

Brian Russell

### **Formal Education:**

Belmont Abbey College, B.S. in Finance

University of South Florida, MBA with an advanced concentration in Finance

### **Business Background:**

Aug 2009 - Present:                      Bluefin Investment Management, LLC

Aug 2007 - Aug 2009:                  Aon Investment Consulting

Sept 2005 - Aug 2007:                Cassedy Financial Group

June 2004 - May 2005:                Merrill Lynch

September 2000 - June 2004:        PaineWebber (now UBS)

## **Item 3      Disciplinary Information**

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

## **Item 4      Other Business Activities**

Mr. Russell is not actively engaged in any investment-related business or occupation. Outside of the investment industry, he does have a real estate broker license in the State of Florida. This business is not substantial and does not occupy any of his time currently, but that may change in the future.

## **Item 5      Additional Compensation**

Mr. Russell does not receive additional compensation for advisory services outside Bluefin Investment Management, LLC.

## **Item 6      Supervision**

Mr. Russell is the President of Bluefin Investment Management, LLC and provides all asset management supervision for the firm.

## **Item 7      Requirements for State-Registered Advisors**

Mr. Russell has never been involved in any arbitration or other civil claim, nor has he ever been the subject of a bankruptcy petition.

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