



## INSIGHT CAPITAL MANAGEMENT



### **Part 2B of Form ADV: Brochure Supplement** January 2024

This brochure supplement provides information about Dustin Blodgett, individual CRD No. 5953002, David Rice, individual CRD No. 1233413, Phillip Rice, individual CRD No. 6457898 and Scott Berg, individual CRD No. 1053783 that supplements the Dustin Blodgett Insight Capital, CRD No.314558, brochure. You should have received a copy of that brochure.

Please contact Dustin Blodgett at [dustin@insightcapmgmt.com](mailto:dustin@insightcapmgmt.com) if you did not receive the Dustin Blodgett Insight Capital LLC , brochure or if you have any questions about the contents of this supplement.

Additional information about Dustin Blodgett, David Rice, Phillip Rice and Sean Berg is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

#### **Our Name and Address:**

Dustin Blodgett Insight Capital, LLC  
d.b.a. Insight Capital Management  
2001 Crow Canyon Road, Suite 150  
San Ramon, CA 94583

#### **Our Contact Information:**

Dustin Blodgett, Managing Member,  
Chief Compliance Officer  
(925) 362-9571  
(925) 362-9577 (fax)  
[dustin@insightcapmgmt.com](mailto:dustin@insightcapmgmt.com)

# Dustin Blodgett

## Item 2 Educational Background and Business Experience

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**This item lists my education and his business experience.**

Dustin Blodgett, born 1988.

Brigham Young University 2012 - BS in Business Management, Finance

### **Business Background:**

- Redstone Advisors, 2011-2012
- Accuvest Global Advisors, 2012 – 2018,
- Cetera Advisor Networks, 2019 –2019,
- Insight Capital Management LLC, 2019-2021
- Dustin Blodgett Insight Capital LLC, 2021- Present

## Item 3 Disciplinary Information

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**This item discusses any disciplinary problems connected with Dustin Blogett.**

There have been no disciplinary problems involving Dustin Blodgett.

## Item 4 Other Business Activities

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Independent Financial Group, LLC, a securities broker-dealer and investment advisor.

I am also a licensed insurance agent with many insurance companies

Insight Capital Management, LLC

## Item 5 Additional Compensation

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**This item discusses any compensation in addition to investment advisory fees that he may receive in connection with giving investment advice to you.**

Dustin Blodgett is a licensed life insurance agent with the state of California.

Furthermore, if you elect to act on any of our recommendations, you are under no obligation to affect any through any particular broker- dealer or through any associated person.

## Item 6 Supervision

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**This item gives you information about the company's supervision of my investment advisory activities.**

Dustin Blodgett is the Chief Compliance Officer of the firm, and is supervised pursuant to the firm's compliance policies and procedures, as well as its code of ethics. If you have any questions or concerns, please contact Dustin Blodgett, Managing Member and Chief Compliance Officer, at (925) 362-9571 or by email at [dustin@insightcapmgmt.com](mailto:dustin@insightcapmgmt.com)

# David Rice

## Item 2 Educational Background and Business Experience

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**This item lists my education and my business experience.**

David R. Rice, born 1951.

Syracuse University 1969 - 1973, BA Economics;

University of California, Berkeley, MBA Accounting.

### **Business Background:**

NPCI Companies, 1985 – 1990; National Holistic Institute, 1990 – 1991; FTFS, 1986 – 1991; Investment Architects, Inc., 2016 – 2021; Guardian Investor Services Corporation, 1994 – 1995; David R. Rice, Financial Advisor, 1991 – Present; Guardian Investor Services Corporation, 1998-1999; Park Avenue Securities, LLC, 1999 – 2001; New England Life, 1983 – 1985; The Guardian Life Insurance Co., 1985 – 1999; Rice Pontes Capital, Inc., 1995 – 2016; Resource Investment Architects, 2017 – 2019; Insight Capital Management, LLC, 2016 – present; Investment Architects, Inc., 2016 – 2021; Dustin Blodgett Insight Capital LLC, 2021- Present

## Item 3 Disciplinary Information

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**This item discusses any disciplinary problems connected with David Rice.**

There have been no disciplinary problems involving David Rice.

## Item 4 Other Business Activities

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Arkadios Capital, LLC, a securities broker-dealer and investment advisor.

He is also a licensed insurance agent with many insurance companies. In addition, I have a business, David Rice Financial Advisor, doing retirement planning. Neither of these entities are investment advisors because they do not give investment advice

Insight Capital Management, LLC, a registered investment advisor.

Please see Item 2, Educational Background and Business Experience, of this brochure for a complete listing of all business experience and relationships.

## Item 5 Additional Compensation

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**This item discusses any compensation in addition to investment advisory fees that he may receive in connection with giving investment advice to you.**

David Rice is a licensed life insurance agent with the state of California.

Furthermore, if you elect to act on any of our recommendations, you are under no obligation to affect any through any particular broker- dealer or through any associated person.

## Item 6 Supervision

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**This item gives you information about the company's supervision of my investment advisory activities.**

David Rice is supervised by Dustin Blodgett, Chief Compliance Officer at Insight Capital Management. David is supervised pursuant to the firm's compliance policies and procedures, as well as its code of ethics. If you have any questions or concerns, please contact Dustin Blodgett, Managing Member and Chief Compliance Officer, at (925) 362-9571 or by email at [dustin@insightcapmgmt.com](mailto:dustin@insightcapmgmt.com)

# Phillip Rice

## Item 2 Educational Background and Business Experience

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**This item lists my education and my business experience.**

Phillip Rice, born 1989.

Linfield College 2011 - BA in Political Science/History

### **Business Background:**

- Terrance Kay P.C., 2011-2012
- Insight Capital Management LLC, 2012 - 2021
- Dustin Blodgett Insight Capital LLC, 2021- Present

## Item 3 Disciplinary Information

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**This item discusses any disciplinary problems connected with Phillip Rice.**

There have been no disciplinary problems involving Phillip Rice.

## Item 4 Other Business Activities

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Phillip Rice is not engaged in any other business activity

## Item 5 Additional Compensation

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**This item discusses any compensation in addition to investment advisory fees that he may receive in connection with giving investment advice to you.**

Phil Rice is a licensed life insurance agent with the state of California.

Furthermore, if you elect to act on any of our recommendations, you are under no obligation to affect any through any particular broker- dealer or through any associated person.

## Item 6 Supervision

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**This item gives you information about the company's supervision of my investment advisory activities.**

Phillip Rice is supervised by Dustin Blodgett, Chief Compliance Officer at Insight Capital Management. Phillip is supervised pursuant to the firm's compliance policies and procedures, as well as its code of ethics. If you have any questions or concerns, please contact Dustin Blodgett, Managing Member and Chief Compliance Officer, at (925) 362-9571 or by email at [dustin@insightcapmgmt.com](mailto:dustin@insightcapmgmt.com)

# Sean Berg

## Item 2 Educational Background and Business Experience

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**This item lists my education and my business experience.**

Scott Berg, born 1958

Bachelor of Arts from University of California Santa Barbara

### **Business Background:**

- Investment Architects, 1989-2021
- Berg Financial, 1990-2023
- Arkadios Wealth, 2021-2023
- Independent Financial Group. LLC, 2023-present
- Insight Capital Management, 2023-present

## Item 3 Disciplinary Information

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**This item discusses any disciplinary problems connected with Phillip Rice.**

There have been no disciplinary problems involving Sean Berg.

## Item 4 Other Business Activities

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- Independent Financial Group, LLC, a securities broker-dealer and investment advisor.
- I am also a licensed insurance agent with many insurance companies
- RS&S Corporation – managing family and personal real estate
- Akido of Alamo – Martial Arts Instructor
- Berg Financial – Shareholder and Trustee

## Item 5 Additional Compensation

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**This item discusses any compensation in addition to investment advisory fees that he may receive in connection with giving investment advice to you.**

Sean Berg is a licensed life insurance agent with the state of California.

Furthermore, if you elect to act on any of our recommendations, you are under no obligation to affect any through any particular broker- dealer or through any associated person.

## Item 6 Supervision

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Mr. Blodgett is the Chief Compliance Officer of the firm, and is supervised pursuant to the firm's compliance policies and procedures, as well as its code of ethics. If you have any questions or concerns, please contact Dustin Blodgett, Managing Member and Chief Compliance Officer, at (925) 362-9571 or by email at [dustin@insightcapmgmt.com](mailto:dustin@insightcapmgmt.com)