

Effective Date: July 1, 2026

PRIVACY POLICY

Tiedemann Advisors, LLC, East End Advisors, LLC, AITi Wealth Management (US International), Inc., and Tiedemann Trust Company form the U.S. Wealth Management division of AITi Global, Inc. (collectively "AITi USWM," "we," "us," or "our"). AITi USWM is committed to safeguarding and protecting client confidential information and privacy. We do not share or disclose any non-public Personal Information about our clients or former clients to nonaffiliated third parties, except as permitted by law, as further described below. The Gramm Leach Bliley Act ("GLBA") and the adoption of Regulation S-P by the Securities and Exchange Commission ("SEC") require that an investment adviser registered with the SEC establish policies and procedures to ensure proper management of client information in a private and secure manner.

This Privacy Policy ("Policy") provides notice to you about our privacy policies and practices. This Policy also applies to information we collect on you, including information we collect from you through various methods, including information collected from your use of our website (<https://alti-global.com/>) (our "Site"). If you require a version of this Policy in an alternative accessible format, please contact us at the contact information at the end of our Policy. AITi USWM shall maintain the privacy of its clients and former clients and their Personal Information (defined below) in the manner disclosed in this Policy.

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I. Privacy Notice

The following statement explains how AITi USWM handles the Personal Information that we receive about our current and former clients. AITi USWM is committed to protecting the privacy and confidentiality of client's and former client's non-public Personal Information. For the purpose of this Policy, Personal Information means information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular consumer or household. Please note, that Section III (California Privacy Rights) of this Policy does not apply to Personal Information covered or collected under or pursuant to GLBA, de-identified or aggregate information, or public information lawfully available from governmental records.

A. Information Collection

AITi USWM may collect Personal Information through the client, or the client's authorized representative, completing forms and applications relating to the client's account or our services. Additionally, AITi USWM may collect Personal Information from the client's, or the client's authorized representative's, further interactions and communications with AITi USWM (including in-person, phone, and electronic) relating to the client's account or our services. The Personal Information we collect may include, but is not limited to, the client's name, e-mail and postal address, phone number, government identifiers, assets, income, financial needs and goals, account balances and transactions (including those with unaffiliated third parties), profile information, background information, and family information (including information regarding dependents and beneficiaries and client objective information).

AITi USWM may also collect Personal Information through audio recordings of meetings and other interactions where recording functionality or AI-assisted note-taking tools are utilized with appropriate notice and consent. Such tools may be used to facilitate note-taking, summarization, follow-up activities, and documentation of communications relating to our services.

B. Information Disclosed and Categories of Affiliates and Non-Affiliated Third Parties to whom AITi USWM May Disclose

It is AITi USWM's policy not to disclose non-public Personal Information about our client(s) to any other parties except where required by law or authorized by the client, or authorized client's representative, or according to this Policy. From time to time, AITi USWM may disclose Personal Information collected from clients to third-party service providers that facilitate the operation of some areas of our investment advisory business and help administer our accounts, and AITi USWM may also use such Personal Information in the account intake process, including conducting anti-money laundering screening. We require any third-party service providers to protect the confidentiality of your Personal Information and to use it only for the purposes for which we disclose the information to them.

In connection with client meetings and communications, we may use third-party service providers that assist with recording, transcription, note-taking, summarization, workflow management, and related communication support services. To support these activities, audio recordings, meeting-related information, and derivative summaries may be processed by such service providers acting on our behalf. We require such service providers to maintain appropriate confidentiality, information security, and data protection safeguards and to use such information only for authorized business purposes.

C. Safeguards

AITi USWM uses the following security measures to protect the privacy of clients. All non-public Personal Information in our systems is guarded by technical and organizational controls designed to mitigate security risks and ensure the security, integrity and availability of our systems and data. In instances where non-public Personal Information is exchanged via the internet, electronic and procedural methods to safeguard this exchange are used. It is the policy of AITi USWM to ensure non-public Personal Information about a client is protected, stored, maintained, and disposed of in ways designed to ensure such information is safeguarded from unauthorized uses or disclosures. However, while AITi USWM uses reasonable information security practices, cybercriminals are increasingly persistent and sophisticated, and no information security program can guarantee perfect security.

D. Service Providers

AITi USWM shares information with non-affiliated third-party service providers in order for the third party to carry out its services for us, including service providers that help support our marketing, outreach, security and IT functions, and reporting as well as service providers that act as our auditors and advisors.

E. Processing and Servicing Transactions

AITi USWM may share information when it is necessary to effect, administer, or enforce a transaction for our clients or if a client initiates a request for us to share Personal Information with an outside party. All requests by clients must be received in writing from the client.

F. Sharing as Permitted or Required by Law

AITi USWM may disclose Personal Information to non-affiliated third parties as permitted by law. For example, this may include a disclosure in connection with a subpoena or similar legal process, a fraud investigation, recording of deeds of trust and mortgages in public records, an audit or examination, or the sale of an account to another financial institution.

G. Privacy Notice Delivery

All new clients shall receive an initial privacy notice prior to entering into an investment advisory agreement, as well as an annual privacy notice.

II. Privacy Policy

The following statement explains how AITi USWM handles the Personal Information that we receive about our current and former clients. AITi USWM is committed to protecting the privacy and confidentiality of client's and former client's non-public Personal Information. For the purpose of this Policy, Personal Information means information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular consumer or household. Please note, that Section III (U.S. State Data Privacy Rights) of this Policy may not apply to Personal Information covered or collected under or pursuant to GLBA, de-identified or aggregate information, or public information lawfully available from governmental records.

A. Notice at Collection: Personal Information We Collect and Have Collected in the Past 12 Months – Sources and Categories

In the 12 months preceding the date of this Policy, we may have collected your Personal Information when you visited our Site, requested information about our products or services, provided us with your information at a conference or other event, clicked through links on our Site to watch or listen to archived events or presentations, or when you voluntarily provided information to us through our Site, email, or phone number. We will continue to collect Personal Information from the same sources.

The categories of Personal Information we may have collected from these sources during the 12 months preceding the date of this Policy, and will continue to collect, include the following:

- Personal identifiers: Name, address, email address, telephone numbers, IP address or other unique identifier, account name and password, and other similar information.
- Financial and insurance information: Bank account information, financial information, source of income, investments, assets information, insurance, and other similar information.
- Protected class information: Age, military, or veteran status.
- Commercial information: Records of products purchased or considered, including consuming histories or tendencies.
- Internet or other electronic activity information: Device and browser type, your browsing and search history on our Site, and information regarding your interaction with our Site.
- Educational information: Information about your educational history, degrees, and credentials.
- Professional information: Name and location of current or past employers, professional qualifications, and information on your resume or CV, including positions you hold.
- Audio and visual information: Video captured through security cameras installed in our offices and, where applicable, audio recordings and related information generated in connection with meetings, calls, or other interactions where recording or AI-assisted note-taking functionality is utilized with notice and consent.
- Inferences drawn from any of the Personal Information identified above.
- Sensitive personal information: Social Security number and health information.

B. Notice at Collection: Purposes for Collection of Personal Information

We use your Personal Information to provide you with information and services you request from us, to contact you from time to time, to provide you with news and other information about AITi USWM, to facilitate your participation in virtual or in-person meetings or conferences, to leverage such information for our internal business and marketing purposes. We may use Personal Information of applicants and employees to evaluate you or otherwise process your data for employment purposes.

We may also use Personal Information obtained through recorded meetings and communications to prepare meeting notes, summaries, action items, client follow-up communications, and related documentation, and to support the delivery and improvement of our advisory services.

Additionally, we use Personal Information, including about your use of our Site, to monitor or improve our Site; for internal business analysis; to prevent fraud as well as activities that violate our Terms of Service or that are illegal; and to protect our rights and the rights and safety of our users or others.

C. Notice at Collection: Categories of Personal Information We Sell or Share or Use for Targeted Advertising

We do not sell personal information or share it for purposes of cross-context behavioral advertising.

D. Notice at Collection: Retention Periods

We retain the categories of personal information we collect for the length of time necessary to provide our services and to comply with legal obligations or to protect our legal rights.

E. Sources From Which We Collect Personal Information

AITi USWM may collect Personal Information through the client, or the client's authorized representative, completing forms and applications relating to the client's account or our services. Additionally, AITi USWM may collect Personal Information from the client's, or the client's authorized representative's, further interactions and communications with AITi USWM (including in-person, phone, and electronic) relating to the client's account or our services.

AITi USWM may also collect Personal Information through audio recordings of meetings and other interactions where recording functionality or AI-assisted note-taking tools are utilized with appropriate notice and consent.

F. Use or Disclosure of Sensitive Personal Information

We do not use or disclose sensitive personal information to create profiles about or infer characteristics about individuals, or for any purposes other than providing our services.

G. No Profiling to Facilitate Decisions with Legal or Other Significant Effects

We do not engage in the automated processing of personal information to create profiles about individuals that are used in furtherance of decisions with legal or other similarly significant effects, such as the provision or denial of financial or lending services, housing, insurance, or access to essential goods or services.

H. Disclosure of Personal Information for Business Purposes in the Past 12 Months

The following chart describes the categories of Personal Information that we disclosed to third parties for a business purpose in the 12 months prior to the date of this Policy:

Categories of Clients' Personal Information	Categories of Third Parties with Which We Shared Personal Information for a Business Purpose
Personal identifiers: Name, address, email address, telephone numbers, IP address or other unique identifier, account name and password, and other similar information.	Service providers that provide customer relationship management (CRM) services; administer certain accounts; assist us in operating, analyzing, and displaying content on our website; provide analytics information; advertise or market our products; provide website hosting, webcast, and teleconference services; provide meeting hosting, recording, transcription, note-taking, summarization, workflow automation, communication support, and related technology services; provide legal and accounting services; act as business partners subject to confidentiality obligations; provide IT and security support; and assist in reporting, auditing, and accounting as well as governmental authorities where required by law or otherwise appropriate.
Financial information: Bank account information, financial information, source of income, investments, assets information, insurance, and other similar information.	Service providers to administer various online accounts for you and perform transactions requested by you; and assist in reporting, auditing and accounting as well as governmental authorities where required by law or otherwise appropriate.
Internet or other electronic network activity information: Device and browser type, your browsing and search history on our Site, and information regarding your interaction with our Site.	Service providers that provide data security services and cloud-based data storage; host our Site and assist with other IT-related functions; provide website hosting, webcast and teleconference services; advertise and market our products; and provide analytics information as well as governmental authorities where required by law or otherwise appropriate.
Audio and visual information: Video captured through security cameras installed in our offices and, where applicable, audio recordings and related information generated in connection with meetings, calls, or other	Service providers that provide security services; meeting hosting, recording, transcription, note-taking, summarization, workflow automation, communication support, and related technology services; and governmental authorities where

Categories of Clients' Personal Information	Categories of Third Parties with Which We Shared Personal Information for a Business Purpose
interactions where recording or AI-assisted note-taking functionality is utilized with notice and consent.	required by law or otherwise appropriate.
Educational information: Information about your educational history, degrees, and credentials.	Recruiting partners; employment firms; online application providers; business partners subject to confidentiality obligations; and governmental authorities where required by law or otherwise appropriate.
Professional information: Name and location of current or past employers, professional qualifications, and information on your resume or CV, including positions you hold.	Recruiting partners; employment firms; online application providers; business partners subject to confidentiality obligations; and governmental authorities where required by law or otherwise appropriate.

Business Purposes for Such Disclosures

We disclosed the aforementioned categories of personal information to the categories of third parties identified above for the following purposes: to manage customer, supplier and vendor accounts and relationships; process payments; verify customers' identities; fulfill orders and transactions; engage in advertising and marketing; prepare meeting notes, summaries, action items, client follow-up communications, and related documentation; support workflow management and communication support services; operate our IT systems and secure our systems; prevent fraud and other illegal activities; and to obtain professional advice about legal and accounting matters.

Additional Information About How We May Share Personal Information

We may also share your Personal Information as required or permitted by law to comply with a subpoena or similar legal process or government request, or when we believe in good faith that disclosure is legally required or otherwise necessary to protect our rights and property or the rights, property, or safety of others, including to law enforcement agencies and judicial and regulatory authorities. We may also share your Personal Information with third parties to help detect and protect against fraud or data security vulnerabilities. And we may transfer your Personal Information to a third party in the event of a sale, merger, reorganization of our entity, or other restructuring. Additionally, we may share your information with our affiliates.

I. Online Data Collection

We have certain cookies on our Site, detailed below, that automatically collect some information about your use of our Site.

Cookies are small, sometimes encrypted text files that are stored on computer hard drives by websites that you visit. They are used to help users navigate websites efficiently as well as to provide information to the owner of the websites. To find out more about cookies, including how to see what cookies have been set and how to manage and delete them, please visit www.allaboutcookies.org.

When you visit our Site, we may place a "cookie" or other online tracking devices (e.g., web beacons) that recognizes you. The cookies and other tracking technologies may also collect information about your IP address or actions taken in connection with the Site. We may use cookies or similar tracking technologies to capture information about the use of our Site, including to improve your user experience. Accordingly, we may store and retrieve information on your device through the use of cookies and similar technologies.

We use Google Analytics to evaluate the use of our website. Google Analytics uses cookies and other identifiers to collect information, such as how often users visit a website, what pages they visit when they do so, and what other websites they visited prior to visiting a website. To learn more about how Google Analytics collects personal information, review Google's Privacy Policy.

J. Personal Information of Minors

Our products and services are not directed to minors under the age of 13. We do not knowingly collect the Personal Information of minors under the age of 13. If you are a parent or guardian and believe we may have collected information about your child, please contact us immediately as described in the "Contact Us" section below.

K. Do Not Track and Similar Opt-Out Signals

Some browsers have a "do not track" feature that lets you tell websites that you do not want to have your online activities tracked. At this time, our Site does not respond to browsers' do not track signals.

L. Third-Party Websites

Our Site may contain links to other third-party websites, which may have privacy policies that differ from our own. We are not responsible for the activities and practices that take place on these websites. Accordingly, we recommend that you review the privacy policies posted on any website that you may access through our Site.

M. Safeguards

AITi USWM uses the following security measures to protect the privacy of clients. All non-public Personal Information in our systems is guarded by technical and organizational controls designed to mitigate security risks and ensure the security, integrity and availability of our systems and data. In instances where non-public Personal Information is exchanged via the internet, electronic and procedural methods to safeguard this exchange are used. It is the policy of AITi USWM to ensure non-public Personal Information about a client is protected, stored, maintained, and disposed of in ways designed to ensure such information is safeguarded from unauthorized uses or disclosures. However, while AITi USWM uses reasonable information security practices, cybercriminals are increasingly persistent and sophisticated, and no information security program can guarantee perfect security.

N. Changes to This Policy

We will review and update this Policy from time to time. If changes are made, we will update the Privacy Policy and reflect the date of such modification in the date above. If the changes are material, you will be notified via email or a notice on our website.

O. Accessibility

To make accessibility-related requests or report barriers, please contact us at 855-741-6098 or Compliance.USWM@alti-global.com.

P. Contact Us

If you have any questions or concerns about your Personal Information or this Policy, please contact us at 855-741-6098 or Compliance.USWM@alti-global.com.

III. U.S. State Data Privacy Rights

Please note, the rights in this Section III do not apply to any Personal Information we maintain about clients of AlTi USWM for purposes of financial products and services, who are covered by the GLBA and largely exempt from certain state law rights described below.

A. California Privacy Rights

The California Consumer Privacy Act (CCPA) gives California residents rights described below with respect to their Personal Information.

1. Your Right to Request Disclosure of Information We Collect and Share About You

We are committed to ensuring that you know what Personal Information we collect. To that end, you can ask us for any or all of following types of information regarding the Personal Information we have collected about you since January 1, 2022:

- Specific pieces of Personal Information we have collected about you;
- Categories of Personal Information we have collected about you;
- Categories of sources from which such Personal Information was collected;
- Categories of Personal Information, if any, that the business sold or disclosed for a business purpose about the client;
- Categories of third parties to whom the Personal Information was sold or disclosed for a business purpose; and
- The business or commercial purpose for collecting or selling your Personal Information.

2. Your Right to Request Deletion of Personal Information We Have Collected About You

Upon your request, we will delete the Personal Information we have collected about you, except for situations where the CCPA authorizes us to retain specific information, including when it is necessary for us to provide you with a good or service that you requested; perform a contract we entered into with you; maintain the functionality or security of our systems; or comply with or exercise rights provided by the law. The law also permits us to retain specific information for our exclusively internal use, but only in ways that are compatible with the context in which you provided the information to us or that are reasonably aligned with your expectations based on your relationship with us. We will act on your deletion request within the timeframes set forth below.

3. Your Right to Request We Correct Personal Information We Have Collected About You

Upon your request, we will correct inaccuracies in your personal information, taking into account the nature of personal data and purposes of processing such information.

4. Your Right to Opt Out of Sale/Sharing of Personal Information We Have Collected About You

The right to request that we stop selling their personal information or sharing it with third parties for the purpose of cross-context behavioral advertising. We do not sell Personal Information as defined by the California Consumer Privacy Act ("CCPA"). Additionally, we do not knowingly sell the Personal Information of minors under the age of 16.

Opt-out Preference Signals

An opt-out preference signal is sent by a platform, technology, or mechanism on behalf of consumers and communicates a consumer's choice to opt out of the sale and sharing of personal information for cross-context behavioral advertising with all businesses that recognize the signal, without having to make individualized requests. Our website does not currently recognize browser-level opt-out preference signals, including the Global Privacy Control.

5. Exercising Your Rights and How We Will Respond

To exercise any of the rights above or to ask a question, contact us at 855-741-6098 or email Compliance.USWM@alti-global.com.

For requests for access, deletion or correction, we will first acknowledge receipt of your request within 10 business days of receipt of your request. We will provide a substantive response to your request as soon as we can, generally within 45 days from when we receive your request, although we may be allowed to take longer to process your request under certain circumstances. If we expect your request is going to take us longer than normal to fulfill, we will let you know.

You can direct us not to sell your personal information or share it for purposes of cross-context behavioral advertising by emailing us at Compliance.USWM@alti-global.com. For such requests, we will comply no later than 15 business days after receipt of your request.

We usually act on requests and provide information free of charge, but we may charge a reasonable fee to cover our administrative costs of providing the information in certain situations. In some cases, the law may allow us to refuse to act on certain requests. When this is the case, we will endeavor to provide you with an explanation as to why.

6. Our Commitment to Honoring Your Rights

If you exercise any of the rights explained in this Policy, we will continue to treat you fairly. If you exercise your rights under this Policy, you will not be denied or charged different prices or rates for goods or services or provided a different level or quality of goods or services than others.

7. Verification of Identity – Access, Deletion or Correction Requests

We will ask you for identifying information and attempt to match it to information that we maintain about you. If we are unable to verify your identity with the degree of certainty required, we will not be able to respond to your request. We will notify you to explain the basis of the denial.

8. Ensuring Veracity of Opt-Out Requests

If we have a good-faith, reasonable belief that a request to opt-out of the sale of Personal Information is fraudulent, we may deny the request. Should this occur, we will inform you and explain why we believe the request is fraudulent.

9. Authorized Agents

You may designate an agent to submit requests on your behalf. The agent must be a natural person or a business entity that is registered with the California Secretary of State.

If you would like to designate an agent to act on your behalf, you and the agent will need to comply with our verification process:

- Requests to Know, Delete or Correct Personal Information: If the agent submits a request, the agent will need to provide us with your signed permission indicating the agent has been authorized to submit the request on your behalf. We will also require that you verify your identity directly with us or confirm with us that you provided the agent with permission to submit the request.
- Requests to Opt Out: If the agent submits a request to opt out of the sale of your personal information or the sharing of your personal information for purposes of cross-context behavioral marketing, the agent will need to provide us with your signed permission indicating the agent has been authorized to submit the opt-out request on your behalf.

Please note that this subsection does not apply when an agent is authorized to act on your behalf pursuant to a valid power of attorney. Any such requests will be processed in accordance with California law pertaining to powers of attorney.

10. California Shine the Light

California Civil Code Section 1798.83, also known as the “Shine the Light” law, permits California residents to annually request, free of charge, information about certain categories of Personal Information a business has disclosed to third parties for direct marketing purposes in the preceding calendar year. For information covered by this law, please reference the “contact us” section below.

B. Oregon Privacy Rights

The Oregon Consumer Privacy Act (“OCPA”) grants Oregon residents the following rights with respect to their personal information we collect:

- Right to Know About Processing: The right to confirm whether we are processing their personal information and the categories of personal information we process or have processed.
- Right to Know Third Parties: A list of third party entities to which we have disclosed personal information.
- Right to a Copy: The right to a portable copy of the personal information we have processed or are processing.
- Right to Delete: The right to request deletion of their personal information that we have collected about them and to have such information deleted, subject to certain exceptions.

- **Right to Correct:** The right to ask that we correct inaccuracies in their personal information, taking into account the nature of personal data and purposes of processing such information.
- **Right to Opt Out Sale:** To the extent we sell their personal information, the right to ask us to stop doing so.
- **Right to Opt Out of Profiling:** To the extent we process their personal information for the purpose of profiling in furtherance of solely automated decisions that produce legal or similarly significant effects, the right to ask us to stop doing so.

Please note that for purpose of this section of this Policy, we consider “personal information” to have the same meaning as “personal data” as defined under the OCPA.

1. Exercising Your Rights and How We Will Respond

Contact us at Compliance.USWM@alti-global.com to exercise the rights described above. We will respond to such requests within 45 days from when we receive your request, although we may be allowed to take longer to process your request under certain circumstances. If we expect your request is going to take us longer than normal to fulfill, we will let you know.

You can direct us not to process your personal information for purposes of targeted advertising by emailing Compliance.USWM@alti-global.com.

We usually act on requests and provide information free of charge, but we may charge a reasonable fee to cover our administrative costs of providing the information in certain situations.

2. Verification of Identity – Requests to Know, Request a Copy, Delete, Correct

We will ask you for identifying information and attempt to match it to information that we maintain about you. If we are unable to verify your identity with the degree of certainty required, we will not be able to respond to the request. We will notify you to explain the basis of the denial.

3. When We Do Not Act on a Request – Appeal Process

In some cases, we may not act on your requests (e.g., if we cannot do so under other laws that apply). When this is the case, we will explain our reasons for not providing you with the information or taking the action (e.g., correcting data) you requested.

Additionally, you have the right to appeal our decision by contacting us at Compliance.USWM@alti-global.com within 30 days after your receipt of our decision. Please provide us with the email address you from which you sent the request and the date of your request. We will respond to your appeal within 45 days of our receipt of the request.

4. Authorized Agents

You may designate an agent to submit an opt-out request on your behalf. If you would like to designate an agent to act on your behalf, we will use reasonable methods to validate their authority to submit a request on your behalf.

Authorized agents can submit a request to opt out of targeted advertising by contacting us at Compliance.USWM@alti-global.com.