

BROCHURE SUPPLEMENT
(Part 2B of Form ADV)

June 2025

Drew Graves

IDB Lido Wealth, LLC

Business Address

1114 6th Avenue, 9th Floor

New York, NY 10036

Direct: 646-631-1436

dgraves@idblidowealth.com

This brochure supplement provides information about Drew Graves that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Officer at (310) 278-8232 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement.

Additional information about Drew Graves is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

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ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Griffin Morgan
Year of Birth: 1997

Educational Background

Union College – Bachelor of Arts in Economics, 2020

Business Background

IDB Lido Wealth, LLC, Investment Adviser Representative (6/2025 – Present)
JPMorgan Chase Bank, Private Client Advisor (9/2020 – 6/2025)
JP Morgan Securities LLC, Licensed Representative (3/2014 – 6/2025)

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Mr. Graves has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

In addition to his duties at IDB Lido, Mr. Graves is the owner of Soaring Student, LLC, a tutoring company for struggling students and men who need academic and social assistance. This makes up less than 5% of his time and/or income.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Graves has no additional compensation to disclose.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Graves. Mr. Kanapathipillai can be contacted at (310) 278-8232 or kkanapathipillai@idblidowealth.com

BROCHURE SUPPLEMENT

(Part 2B of Form ADV)

April 25, 2023

David Haddad

IDB Lido Wealth, LLC

1114 6th Avenue, 9th floor,
New York, NY, 10036
Phone: (310) 278-8232
dhaddad@lidoadvisors.com

This brochure supplement provides information about David Haddad that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Department at (310) 278-8232 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement. Thank you.

Additional information about David Haddad is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

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ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

David Haddad
Year of Birth: 1995

Educational Background

Touro College NYSCAS – Bachelor of Science in Biology (2019)

Business Background

IDB Lido Wealth, LLC, Associate (04/2023 – Present)
Lido Advisors, LLC, Associate, Private Client Services (07/2022 – Present)
Self-employed, Stock trader & Investor (09/2019 – 07/2022)

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. David Haddad has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

In addition to his duties at IDB Lido, Mr. Haddad is employed at Lido Advisors, LLC, which is an owner of IDB Lido and an SEC registered investment adviser. While Mr. Haddad devotes as much time to the business of IDB Lido as is necessary to perform his duties as an investment adviser representative, he devotes a large amount of his time (approximately 80%) performing services for Lido Advisors. The dual roles and the additional compensation he receives create a conflict of interest. This is mainly because his obligation to Lido Advisors fragments the amount of time he can spend performing his duties for IDB Lido. To help mitigate the conflict, IDB Lido has implemented supervisory procedures to oversee and monitor the services provided by Mr. Haddad to IDB Lido clients. Mr. Haddad also serves as CFO to Congregation Ahavat Torah, a 501(c)(3) non-profit organization where he spends less than 10% of his time.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Haddad is paid a portion of the asset management fees paid by IDB Lido clients that he services, and at times can share in a portion of any fees relating to consulting services provided to those clients. This creates a conflict of interest due to the incentive to receive compensation based on the services provided. In addition, the compensation received from his employment

with Lido Advisors and his services he performs as CFO to Congregation Ahavat Torah, which currently accounts for approximately 95% of his annual income, also creates a conflict of interest. In addition to the supervision and oversight of the services performed by Mr. Haddad, IDB Lido addresses the conflicts by providing disclosures to clients at the time of entering into an advisory agreement, mainly through the delivery of the Firm's Disclosure Brochure (Form ADV Part 2A) and this Supplemental Brochure.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Haddad. Mr. Kanapathipillai can be contacted at (310) 278- 8232 or kkanapathipillai@idblidowealth.com.

BROCHURE SUPPLEMENT
(Part 2B of Form ADV)

June 2024

Gregory Paul Kushner

IDB Lido Wealth, LLC

Principal Address

1114 6th Avenue, 9th Floor
New York, NY 10036
Phone: 646-839-9793
gkushner@idblidowealth.com

Principal Address

1875 Century Park East, Suite 950
Los Angeles, CA 90067

This brochure supplement provides information about Gregory Paul Kushner that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Officer at 646-839-9793 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement.

Additional information about Gregory Paul Kushner is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

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ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Gregory P. Kushner

Year of Birth: 1956

Educational Background

University of Southern California – Bachelor of Science in Business Administration, 1978

Los Angeles Valley College – Associate of Arts in Business Administration, 1975

Business Background

IDB Lido Wealth, LLC, Investment Adviser Representative (6/2024 – Present)

Lido Advisors, LLC, Founder & Chairman, Sr. Managing Director (2/2022 – Present)

Lido Consulting Group, LLC, Founder & Chairman (9/2021 – Present)

Kushner Holdings, Inc., Member (7/2015 – Present)

Lido Advisors Holdings, LLC, Member (7/2015 – Present)

Lido Advisors, LLC, Founder & Chief Executive Officer, Senior Managing Director,
Wealth Advisor (5/2021 – 02/2022)

Oakhurst Advisors, LLC, Senior Managing Director (4/2016 – 12/2022)

Lido Advisors, LLC, Chairman and Chief Executive Officer (7/2015 – 5/2021)

Lido Advisors, LLC, President and Chief Compliance Officer (6/2015 – 7/2015)

Investment Security Corp., Registered Representative (3/2001 – 1/2021)

Lido Advisors, Inc., President and Chief Compliance Officer (5/1999 – 6/2015)

Lido Consulting, Inc., President (11/1995 – 9/2021)

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Mr. Kushner has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

In addition to his duties at IDB Lido, Mr. Kushner is employed at Lido Advisors, LLC (“Lido”), which is an owner of IDB Lido and an SEC registered investment adviser. While Mr. Kushner devotes as much time to the business of IDB Lido as is necessary to perform his duties as an investment adviser representative, he devotes a large amount of his time more than 90%) performing services for Lido. The dual roles and the additional compensation he receives create a conflict of interest. This is mainly because his obligation to Lido fragments the amount of time he can spend performing his duties for IDB Lido. To help mitigate the conflict, IDB Lido has implemented supervisory procedures to oversee and monitor the services provided by Mr. Kushner to IDB Lido clients.

Additionally, Mr. Kushner is the founder and Chairman of Lido Consulting Group, LLC, the successor to Lido Consulting Inc., a personal services consulting firm specializing in providing consulting and other services to family offices and high net worth individuals. Lido Consulting

Group, LLC is wholly owned by Lido Advisors, LLC. Notably, Lido Consulting Group, LLC generates revenues from seminar and conference planning, consulting, and executive recruiting activities. Mr. Kushner's workday is divided among his activities for Lido Advisors, LLC, Lido Consulting Group, LLC, and IDB Lido Wealth, LLC.

Mr. Kushner also serves as the Managing Member for the following limited liability companies ("LLCs") that invest in commercial and residential real estate:

- Wildwood Apartments, LLC
- Shangri-La Apartments, LLC
- 616 N. La Brea, LLC
- 1045 4th Avenue, LLC
- 1671 Fremont, LLC, a wholly owned subsidiary of 1045 4th Avenue, LLC
- Lido Flamingo, LLC

The members of these limited liability companies are family members and close friends, and the main purpose of each LLC is to engage in passive real estate investing. Also, Lido Flamingo, LLC invests in certain private funds that are also invested in by Lido clients. The fact that Mr. Kushner is a Managing Member of LLCs that invest in certain private funds that are invested in by Lido clients creates a conflict of interest due to the private funds being limited offerings. Lido addresses the conflict through its written Code of Ethics that includes preapproval and reporting requirements of certain personal securities transactions, including private funds by Lido employees, and through disclosures to clients. In addition, clients are not obligated to implement recommended transactions in private funds or other private limited partnerships.

While Mr. Kushner serves as the Managing Member for the LLCs, he is not involved in the day-to-day management of the various properties and/or other investments made by the LLCs. Mr. Kushner also serves as trustee to two family-related trusts and as CFO to a family foundation, and all three entities are clients of Lido. Additionally, Mr. Kushner serves as CFO and is a shareholder of a California corporation, Kushdon Management Inc., that provides real estate management services. This company provides management services to some of the real estate invested in by family LLCs.

Mr. Kushner serves on the Board of Directors for Los Angeles based Charitable Organizations. These organizations are listed below:

- Safe Parking LA
- We Benefit Children ("WBC") formerly known as the Water Buffalo Club

In addition, Mr. Kushner is a member of the Board of Governors of the City of Hope and heads the Investment Committee of the Board for C5 Youth Foundation of Southern California. Mr. Kushner spends less than 10% of his work time performing his duties as Managing Member, trustee, and/or CFO for all these entities.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Kushner is paid a portion of the asset management fees paid by IDB Lido clients that he services. This creates a conflict of interest due to the incentive to receive compensation based on the services provided. In addition, the compensation received from his employment with Lido Advisors, which currently accounts for approximately 90% of his annual income, also creates a conflict of interest. In addition to the supervision and oversight of the services performed by Mr. Kushner, IDB Lido addresses the conflicts by providing disclosures to clients at the time of entering into an advisory agreement, mainly through the delivery of the Firm's Disclosure Brochure (Form ADV Part 2A) and this Supplemental Brochure.

In addition to the compensation received from Lido, Mr. Kushner, as a member (through his wholly owned company, Kushner Holdings, Inc.) and part owner of Lido Group Holdings, LLC, shares in the profits and losses of LAH. The compensation Mr. Kushner receives for performing his roles as Managing Member, Trustee and CFO for the family-related entities and LLCs described in Item 4 accounts for less than 10% of his income.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Kushner. Mr. Kanapathipillai can be contacted at (310) 278-8232 or kkanapathipillai@idblidowealth.com.

BROCHURE SUPPLEMENT
(Part 2B of Form ADV)

July 2024

Griffin Morgan

IDB Lido Wealth, LLC

Business Address

1114 6th Avenue, 9th Floor

New York, NY 10036

Direct: 917-203-9921

gmorgan@idblidowealth.com

This brochure supplement provides information about Griffin Morgan that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Officer at (310) 278-8232 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement.

Additional information about Griffin Morgan is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

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ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Griffin Morgan
Year of Birth: 1997

Educational Background

Union College – Bachelor of Arts in Economics, 2020

Business Background

IDB Lido Wealth, LLC, Investment Adviser Representative (5/2024 – Present)
Lido Advisors, LLC, Investment Adviser Representative (5/2024 – Present)
Unemployed (1/2024 – 5/2024)
Masterworks Advisers, LLC, Investment Advisor (6/2023 – 12/2023)
Arete Wealth Advisors, LLC, Investment Advisory Rep (6/2022 – 6/2023)
Arete Wealth MGMT, LLC, Registered Representative (6/2022 – 6/2023)
Masterworks, Sales (6/2022 – 6/2023)
John Hancock, Consolidation Coordinator (10/2020 – 5/2022)
John Hancock Distributors LLC, Registered Representative (10/2020 – 5/2022)
Wellesley Youth Lacrosse Club, Lacross Coach (9/2020 – 10/2021)
VDC Research, Intern (6/2019 – 8/2019)
Union College, Student (9/2016 – 6/2020)

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Mr. Morgan has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

In addition to his duties at IDB Lido, Mr. Morgan is employed at Lido Advisors, LLC, which is an owner of IDB Lido and an SEC registered investment adviser. While Mr. Morgan devotes as much time to the business of IDB Lido as is necessary to perform his duties as an investment adviser representative, he devotes a large amount of his time (approximately 90%) performing services for Lido Advisors. The dual roles and the additional compensation he receives create a conflict of interest. This is mainly because his obligation to Lido Advisors fragments the amount of time he can spend performing his duties for IDB Lido. To help mitigate the conflict, IDB Lido has implemented supervisory procedures to oversee and monitor the services provided by Mr. Morgan to IDB Lido clients.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Morgan is paid a portion of the asset management fees paid by IDB Lido clients that he services, and at times can share in a portion of any fees relating to consulting services provided to those clients. This creates a conflict of interest due to the incentive to receive compensation based on the services provided. In addition, the compensation received from his employment with Lido Advisors, which currently accounts for approximately 90% of his annual income, also creates a conflict of interest. In addition to the supervision and oversight of the services performed by Mr. Morgan, IDB Lido addresses the conflicts by providing disclosures to clients at the time of entering into an advisory agreement, mainly through the delivery of the Firm's Disclosure Brochure (Form ADV Part 2A) and this Supplemental Brochure.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Morgan. Mr. Kanapathipillai can be contacted at (310) 278-8232 or kkanapathipillai@idblidowealth.com.

BROCHURE SUPPLEMENT
(Part 2B of Form ADV)

April 30, 2023

Jack Weinstein

IDB Lido Wealth, LLC

1114 6th Avenue, 9th floor,

New York, NY, 10036

Phone: (310) 278-8232

jweinstein@lidoadvisors.com

This brochure supplement provides information about Jack Weinstein that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Department at (310) 278-8232 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement. Thank you.

Additional information about Jack Weinstein is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

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ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Jack Weinstein
Year of Birth: 1996

Educational Background

American University – BS in Business Administration, Marketing and Communications (2017)

Business Background

IDB Lido Wealth, LLC, Vice President, Wealth Manager (04/2023 – Present)
Lido Advisors, LLC, Vice President, Wealth Manager (01/2023 – Present)
Lido Advisors, LLC, Wealth Manager (02/2022 – 01/2023)
Lido Advisors, LLC, Wealth Advisor (07/2021 – 02/2022)
Lido Advisors, LLC, Associate, Private Client Services (01/2020 – 07/2021)
BNY Mellon Wealth Management (01/2018-12/2019)
American University, Student (08/2014-12/2017)

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Jack Weinstein has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

In addition to his duties at IDB Lido, Mr. Weinstein is employed at Lido Advisors, LLC, which is an owner of IDB Lido and an SEC registered investment adviser. While Mr. Weinstein devotes as much time to the business of IDB Lido as is necessary to perform his duties as an investment adviser representative, he devotes a large amount of his time (approximately 95%) performing services for Lido Advisors. The dual roles and the additional compensation he receives create a conflict of interest. This is mainly because his obligation to Lido Advisors fragments the amount of time he can spend performing his duties for IDB Lido. To help mitigate the conflict, IDB Lido has implemented supervisory procedures to oversee and monitor the services provided by Mr. Weinstein to IDB Lido clients.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Weinstein is paid a portion of the asset management fees paid by IDB Lido clients that he services, and at times can share in a portion of any fees relating to consulting services provided to those clients. This creates a conflict of interest due to the incentive to receive compensation based on the services provided. In addition, the compensation received from his employment with Lido Advisors, which currently accounts for approximately 95% of his annual income, also creates a conflict of interest. In addition to the supervision and oversight of the services performed by Mr. Weinstein, IDB Lido addresses the conflicts by providing disclosures to clients at the time of entering into an advisory agreement, mainly through the delivery of the Firm's Disclosure Brochure (Form ADV Part 2A) and this Supplemental Brochure.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Weinstein. Mr. Kanapathipillai can be contacted at (310) 278- 8232 or kkanapathipillai@idblidowealth.com.

BROCHURE SUPPLEMENT

(Part 2B of Form ADV)

January 2024

Nadav Schwartz

IDB Lido Wealth, LLC

1114 6th Avenue, 9th floor,

New York, NY, 10036

Phone: (310) 278-8232

Nschwartz@idblidowealth.com

This brochure supplement provides information about Nadav Schwartz that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Department at (310) 278-8232 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement. Thank you.

Additional information about Nadav Schwartz is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

Please refer to previous page.

ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Nadav Schwartz
Year of Birth: 1985

Educational Background

Binghamton University – Bachelor of Science and Finance (2007)

Business Background

IDB Lido Wealth, LLC, Investment Adviser Representative (11/2023 – Present)
On Family Leave (08/2021 – 11/2023)
Sanford C. Bernstein & Co., LLC, Financial Advisor, Vice President (09/2019 – 08/2021)
UBS Financial Services, Inc., Wealth Strategy Associate, Associate Director (11/2015 – 03/2019)
Credit Suisse Securities, Inc., Senior Relationship Associate (10/2012 – 11/2015)

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC (“IDB Lido”) is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Nadav Schwartz has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

Mr. Schwartz is not engaged in any other outside business activities.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Schwartz receives no additional compensation.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Schwartz. Mr. Kanapathipillai can be contacted at (310) 278- 8232 or kkanapathipillai@idblidowealth.com.

BROCHURE SUPPLEMENT
(Part 2B of Form ADV)

May 26, 2023

Robert W. Marton

IDB Lido Wealth, LLC

1114 6th Avenue, 9th floor,

New York, NY, 10036

Phone: (310) 278-8232

Rmarton@lidoadvisors.com

This brochure supplement provides information about Robert W. Marton that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Department at (310) 278-8232 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement. Thank you.

Additional information about Robert W. Marton is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

Please refer to previous page.

ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Robert W. Marton
Year of Birth: 1964

Educational Background

University of Maryland – Bachelor’s Degree, 1986

Business Background

IDB Lido Wealth, LLC, Senior Managing Director (04/2023 – Present)
Lido Advisors, LLC – Senior Managing Director (11/2021 – Present)
Lido Advisors, LLC – Managing Director, Wealth Advisor (10/2019 – 10/2021)
Bank of America, N.A., SVP Wealth Management (12/2009 – 09/2019)
Merrill Lynch, Pierce, Fenner & Smith Incorporated, SVP Wealth Management (11/2008-10/2019)

Mr. Marton is a CERTIFIED FINANCIAL PLANNER™ and a CERTIFIED INVESTMENT MANAGEMENT ANALYSTSM certificant.

Explanation of Professional Designation:

Certified Financial Planner™ Certification Explanation

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 a number of other countries for its (1) high standard of professional educations; (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:

- Education – 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;

- Examination – 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;
- Experience – Complete all three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to 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:

- Continuing Education – 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
- Ethics – Renew an agreement to be bound by the Standards of Professional conduct. The Standards prominently require that CFP® professionals provide financial planning services 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.

Certified Investment Management AnalystSM Certification Explanation

The CIMA® certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider, pass an online Certification Examination, and have an acceptable regulatory history. CIMA designees are required to adhere to IMCA's *Code of Professional Responsibility*, *Standards of Practice*, and *Rules and Guidelines for Use of the Marks*. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (IMCA).

The CIMA certification has earned ANSI® (American National Standards Institute) accreditation under the personnel certification program. The American National Standards Institute, or ANSI, is a private non-profit organization that facilitates standardization and conformity assessment activities in the United States. CIMA is the first financial services credential to meet this international standard for personnel certification.

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you.

Mr. Marton has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

In addition to his duties at IDB Lido, Mr. Marton is employed at Lido Advisors, LLC, which is an owner of IDB Lido and an SEC registered investment adviser. While Mr. Marton devotes as much time to the business of IDB Lido as is necessary to perform his duties as an investment adviser representative, he devotes a large amount of his time (approximately 60%) performing services for Lido Advisors. The dual roles and the additional compensation he receives create a conflict of interest. This is mainly because his obligation to Lido Advisors fragments the amount of time he can spend performing his duties for IDB Lido. To help mitigate the conflict, IDB Lido has implemented supervisory procedures to oversee and monitor the services provided by Mr. Marton to IDB Lido clients.

Mr. Marton also serves as a committee member for a few charitable organizations including Jacobsen Jewish Community Foundation and Ruth & Norman Rales Jewish Family Services. Mr. Marton spends less than 10 hours a month engaging in these activities, with approximately one hour during trading hours.

ITEM 5: ADDITIONAL COMPENSATION

In addition to the regular salary from IDB Lido, Mr. Marton also is paid a portion of the asset management fees paid by IDB Lido clients that he services, and at times can share in a portion of any fees relating to consulting services provided to those clients. This creates a conflict of interest due to the incentive to receive compensation based on the services provided. In addition, the compensation received from his employment with Lido Advisors, which currently accounts for approximately 92% of his annual income, also creates a conflict of interest. In addition to the supervision and oversight of the services performed by Mr. Marton, IDB Lido addresses the conflicts by providing disclosures to clients at the time of entering into an advisory agreement, mainly through the delivery of the Firm's Disclosure Brochure (Form ADV Part 2A) and this Supplemental Brochure.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Marton. Mr. Kanapathipillai can be contacted at (310) 278- 8232 or kkanapathipillai@idblidowealth.com.

BROCHURE SUPPLEMENT
(Part 2B of Form ADV)

April 2024

Stuart Katz

IDB Lido Wealth, LLC

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skatz@idblidowealth.com

This brochure supplement provides information about Cary Lieberman that supplements IDB Lido Wealth, LLC's Disclosure Brochure (Form ADV Part 2A). You should have received a copy of that Disclosure Brochure. Please contact our Compliance Officer at (310) 278-8232 if you did not receive IDB Lido Wealth, LLC's Disclosure Brochure or if you have any questions about the contents of this supplement. Thank you.

Additional information about Cary Lieberman is available on the SEC's website at adviserinfo.sec.gov.

ITEM 1: COVER PAGE

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ITEM 2: EDUCATIONAL BACKGROUND AND BUSINESS EXPERIENCE

Stuart Katz
Year of Birth: 197

Educational Background

Cornell University – Bachelor of Science in Industrial and Labor Relations, 1999
Northwestern University School of Law – Juris Doctor, 2003

Business Background

IDB Lido Wealth, LLC, Investment Adviser Representative (4/2023 – Present)
Lido Advisors, LLC, Investment Adviser Representative (7/2021 – Present)
Sanford C. Bernstein & Co. LLC, Vice President (5/2011 – 7/2021)
Manatt, Phelps & Phillips LLC, Attorney (10/2009 – 12/2010)

ITEM 3: DISCIPLINARY INFORMATION

IDB Lido Wealth, LLC is required to disclose all material facts regarding any legal or disciplinary event that would be material to your evaluation of each investment person providing advice to you. Mr. Katz has no information required to be disclosed under this Item.

ITEM 4: OTHER BUSINESS ACTIVITIES

In addition to his duties at IDB Lido, Mr. Katz is employed at Lido Advisors, LLC, which is an owner of IDB Lido and an SEC registered investment adviser. While Mr. Katz devotes as much time to the business of IDB Lido as is necessary to perform his duties as an investment adviser representative, he devotes a large amount of his time (approximately 90%) performing services for Lido Advisors. The dual roles and the additional compensation he receives create a conflict of interest. This is mainly because his obligation to Lido Advisors fragments the amount of time he can spend performing his duties for IDB Lido. To help mitigate the conflict, IDB Lido has implemented supervisory procedures to oversee and monitor the services provided by Mr. Katz to IDB Lido clients.

ITEM 5: ADDITIONAL COMPENSATION

Mr. Katz is paid a portion of the asset management fees paid by IDB Lido clients that he services, and at times can share in a portion of any fees relating to consulting services provided to those clients. This creates a conflict of interest due to the incentive to receive compensation based on the services provided. In addition, the compensation received from his employment with Lido Advisors, which currently accounts for approximately 90% of his annual income, also creates a conflict of interest. In addition to the supervision and oversight of the services performed by Mr. Katz, IDB Lido addresses the conflicts by providing disclosures to clients at the time of entering into an advisory agreement, mainly through the delivery of the Firm's Disclosure Brochure (Form ADV Part 2A) and this Supplemental Brochure.

ITEM 6: SUPERVISION

Mr. Karan Kanapathipillai, Chief Executive Officer of IDB Lido Wealth, LLC, is responsible for the general supervision and oversight of all investment advice given by its supervised persons, including Mr. Katz. Mr. Kanapathipillai can be contacted at (310) 278-8232 or kkanapathipillai@idblidowealth.com.