

# **Firm Brochure Supplement**

(Part 2B of Form ADV)

April 7, 2026

## **IDB Lido Wealth, LLC**

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**This brochure supplement provides information about all Investment Adviser Representatives that supplements the IDB Lido Wealth, LLC's ("IDB Lido") Disclosure Brochure (Form ADV Part 2A).**

If you have any questions about the contents of this brochure, please contact us at 646-631-1130 or [compliance@idblidowealth.com](mailto:compliance@idblidowealth.com). The information in this brochure has not been approved or verified by the U.S. Securities and Exchange Commission ("SEC") or by any state securities authority.

Additional information about IDB Lido and its investment adviser representatives is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**Drew Graves**

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

**Educational Background & Business Experience**

Drew Graves (b. 1974) joined IDB Lido Wealth LLC in June 2025 as an Investment Adviser Representative after a decade with several JPMorgan entities including roles as a Private Client Advisor, Liscensed Representative, Private Client Banker, and Relationship Banker. Drew holds a B.A. in Economics from Union College.

**Disciplinary Information**

Drew Graves has no disciplinary information to disclose.

**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.

**Additional Compensation**

Drew Graves has no additional compensation to disclose.

**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 Drew Graves. Mr. Kanapathipillai can be contacted at 646-631-1130 or kkanapathipillai@idblidowealth.com.

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**David Haddad**

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

**Educational Background & Business Experience**

David Haddad (b. 1995) joined IDB Lido Wealth, LLC in April 2023 after serving as an Investment Adviser Representative with Lido Advisors, LLC in July 2022 after several years of being self-employed. David holds a B.S. in Biology from Touro College New York School of Career and Applied Studies.

**Disciplinary Information**

David Haddad has no disciplinary information to disclose.

**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.

**Additional Compensation**

David Haddad has no additional compensation to disclose.

**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 David Haddad. Mr. Kanapathipillai can be contacted at 646-631-1130 or kkanapathipillai@idblidowealth.com.

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**Gregory Kushner**

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

**Educational Background & Business Experience**

Gregory Kushner (b. 1956) joined IDB Lido Wealth, LLC in June 2024 with considerable experience in the financial industry. Greg founded Lido Advisors in 1999 with over two decades of experience in financial consulting. He previously founded Lido Consulting in 1995 to work with family offices on best practices and effective wealth management. Greg began his career as a CPA, eventually becoming Partner of Kushner & Rogozenski, CPAs. Greg holds a B.S. in Business Administration from University of Southern California and an A.A. in Business Administration from Los Angeles Valley College.

**Disciplinary Information**

Gregory Kushner has no disciplinary information to disclose.

**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.

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 and Lido Consulting Group, 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; and 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 performs real estate management services. This company provides management services to some of the real estate invested in by the family LLCs.

Mr. Kushner spends less than 10% of his work time performing his duties as Managing Member, trustee, and/or CFO for all of these entities.

### **Additional Compensation**

Gregory Kushner has no additional compensation to disclose.

### **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 Gregory Kushner. Mr. Kanapathipillai can be contacted at 646-631-1130 or kkanapathipillai@idblidowealth.com.

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**Griffin Morgan**

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

**Educational Background & Business Experience**

Griffin Morgan (b. 1997) simultaneously joined IDB Lido Wealth, LLC and Lido Advisors, LLC in May 2024 after working as an Investment Advisor Representative for Masterworks Advisers LLC and Arete Wealth Advisers, LLC. He also worked for Arete Wealth Management LLC and John Hancock Distributors LLC as a Registered Representative. Griffin holds a B.A. in Economics from Union College.

**Disciplinary Information**

Griffin Morgan has no disciplinary information to disclose.

**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.

**Additional Compensation**

Griffin Morgan has no additional compensation to disclose.

**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 Griffin Morgan. Mr. Kanapathipillai can be contacted at 646-631-1130 or kkanapathipillai@idblidowealth.com.

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**Jack Weinstein**

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

**Educational Background & Business Experience**

Jack Weinstein (b. 1996) joined IDB Lido Wealth LLC in April 2023 as an Investment Adviser Representative. He has served in the same capacity at Lido Advisors LLC since January 2020 after gaining experience as an Associate with BNY Mellon Wealth Management. Jack holds a B.B.A. in Marketing and Entrepreneurship from American University.

**Disciplinary Information**

Jack Weinstein has no disciplinary information to disclose.

**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.

**Additional Compensation**

Jack Weinstein has no additional compensation to disclose.

**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 Jack Weinstein. Mr. Kanapathipillai can be contacted at 646-631-1130 or [kkanapathipillai@idblidowealth.com](mailto:kkanapathipillai@idblidowealth.com).

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**Nadav Schwartz**

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

**Educational Background & Business Experience**

Nadav Schwartz (b. 1985) joined IDB Lido Wealth, LLC in November 2023 with prior experience as a Financial Advisor, Vice President with Sanford C. Bernstein & CO and Wealth Strategy Associate, Associate Director with UBS Financial Services, Inc. He got his start in the financial industry as a Senior Relationship Associate with Credit Suisse Securities LLC. Nadav holds a B.S. in Finance from Binghamton University.

**Disciplinary Information**

Nadav Schwartz has no disciplinary information to disclose.

**Other Business Activities**

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

**Additional Compensation**

Nadav Schwartz has no additional compensation to disclose.

**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 Nadav Schwartz. Mr. Kanapathipillai can be contacted at 646-631-1130 or kkanapathipillai@idblidowealth.com.

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**Robert Marton, CFP®**

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

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**Educational Background & Business Experience**

Robert Marton (b. 1964) joined IDB Lido Wealth, LLC in April 2023 as an Investment Adviser Representative. He has served in the same capacity at Lido Advisors LLC since October 2019 bringing over a decade of experience. He previously worked as a SVP Wealth Management for Bank of America and Merrill Lynch, Pierce, Fenner, & Smith Inc. Robert holds a B.A. in General Studies from the University of Maryland.

**CERTIFIED FINANCIAL PLANNER® professional**

I am certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, I may refer to myself as a CERTIFIED FINANCIAL PLANNER® professional or a CFP® professional, and I may use these and the other certification marks (the "CFP Board Certification Marks") that Certified Financial Planner Board of Standards Center for Financial Planning, Inc. has licensed to CFP Board in the United States. The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at [www.cfp.net](http://www.cfp.net).

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- Education – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- Examination – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- Experience – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- Ethics – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- Ethics – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A

client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.

- Continuing Education – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

#### Disciplinary Information

Robert Marton has no disciplinary information to disclose.

#### **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.

#### **Additional Compensation**

Robert Marton has no additional compensation to disclose.

#### **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 Robert Marton. Mr. Kanapathipillai can be contacted at 646-631-1130 or [kkanapathipillai@idblidowealth.com](mailto:kkanapathipillai@idblidowealth.com).

**Brochure Supplement**  
(Part 2B of Form ADV)  
April 2026



**Stuart Katz**

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

**Educational Background & Business Experience**

Stuart Katz (b. 1977) joined IDB Lido Wealth LLC in April 2023 as an Investment Adviser Representative. He has served in a similar capacity at Lido Advisors LLC since July 2021 after previously working as the Vice President of Sanford C. Bernstein & Co. for a decade. Stuart holds a B.S. in Industrial and Labor Relations from Cornell University and a J.D. from Northwestern University School of Law.

**Disciplinary Information**

Stuart Katz has no disciplinary information to disclose.

**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.

**Additional Compensation**

Stuart Katz has no additional compensation to disclose.

**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 Stuart Katz. Mr. Kanapathipillai can be contacted at 646-631-1130 or kkanapathipillai@idblidowealth.com.

**Brochure Supplement**  
(Part 2B of Form ADV)  
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**Zachary Schneider**

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

**Educational Background & Business Experience**

Zachary Schneider (b. 2001) joined IDB Lido Wealth LLC in June 2023 as an Investment Adviser Representative. He has served in a similar role at Lido Advisors, LLC since February 2022 after being introduced through a summer internship. He came with several years of experience as an Associate with First Fidelity Loan Servicing. Zack holds of Bachelor of General Studies from Florida Atlantic University.

**Disciplinary Information**

Zachary Schneider has no disciplinary information to disclose.

**Other Business Activities**

In addition to his duties at IDB Lido, Mr. Schneider 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.

**Additional Compensation**

Zachary Schneider has no additional compensation to disclose.

**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 Zachary Schneider. Mr. Kanapathipillai can be contacted at 646-631-1130 or kkanapathipillai@idblidowealth.com.