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## Introduction

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Tiedemann Advisors, LLC (“**Tiedemann**,” “**we**,” “**us**,” or “**our**”) is registered with the U.S. Securities and Exchange Commission as an investment adviser based in New York, New York.

Brokerage and investment advisory services and fees differ, and it is important for retail investors to understand the differences. Free and simple tools are available to research firms and financial professionals at [Investor.gov/CRS](https://investor.gov/CRS), which also provides educational materials about broker-dealers, investment advisers, and investing.

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### What investment services and advice can you provide me?

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Tiedemann offers investment advisory services to retail investors. Tiedemann will meet with you to identify and discuss your financial goals, financial needs, level of investment risk that you are willing to bear and specific investment objectives. Tiedemann will then review your existing portfolio and customize a portfolio of investments including stocks, exchange traded funds (“**ETFs**”), mutual funds, closed end funds, private fund vehicles, and other investments that can help you meet those goals and financial needs. Tiedemann selects investment advisers to advise private investment fund commingled vehicles, (the “**Funds**”). These Funds are offered primarily to Tiedemann clients as part of our investment advisory services. Investors in the Funds must meet certain net worth criteria. As part of our investment advisory services, Tiedemann also provides estate planning, cash flow management and other consulting services to separately managed account clients.

If you provide Tiedemann with discretionary authority, Tiedemann will make investment decisions for your account and execute trades on your behalf. Tiedemann also offers non-discretionary services, meaning that Tiedemann will discuss its trade recommendations with you, but you will make the ultimate decisions regarding the purchase or sale of securities. Tiedemann generally requires a \$25,000,000 minimum account balance but may waive the minimum in its discretion.

As part of the standard services Tiedemann provides, Tiedemann monitors the investments in your account on an ongoing basis, and specifically reviews your account monthly to make sure the investments Tiedemann recommends to you are meeting your financial goals. Additional information can be found by reading Items 4, 5, 8, 12, and 13 of Tiedemann’s [Form ADV Part 2A Brochure](#).

**Conversation Starter** - *Given my financial situation, should I choose an investment advisory service? Why or why not? How will you choose investments to recommend to me? What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?*

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### What fees will I pay?

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Tiedemann’s annual management fee is generally up to 0.85% of a client’s assets under management but may vary by client needs. In instances where Tiedemann waives our minimum account balance, we will generally impose a minimum annual management fee that may be in excess of 0.85% of a client’s assets under management. Tiedemann’s fees are billed quarterly in arrears and are debited from your account or invoiced to you. Because Tiedemann is paid based on the assets in its clients’ accounts, there is an inherent incentive for Tiedemann to encourage a client to increase the assets under management in their account to earn higher fees.

#### *Description of Other Fees and Costs*

You may be charged additional fees and/or expenses by third parties that include, but are not limited to, custodial fees, brokerage commissions, mutual fund fees and transaction fees. Funds not advised by Tiedemann also charge management and/or performance fees in addition to Tiedemann’s fees. You will be responsible for expenses incurred by Funds advised by Tiedemann. Tiedemann typically charges a flat fee for extended family office (bill payment, bookkeeping, etc.) services.

You will pay fees and expenses whether you make or lose money on your investments. Fees and expenses will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. Additional information is available by reading Items 5, 12 and 15 of our [Form ADV Part 2A Brochure](#).

**Conversation Starter** - *Help me understand how these fees and costs might affect my investments. If I give you \$10,000 to invest, how much will go to fees and costs and how much will be invested for me?*

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**What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?**

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**When Tiedemann acts as your investment adviser**, Tiedemann must act in your best interest, and not put our interest ahead of yours. At the same time, the way Tiedemann makes money creates some conflicts with your interests. You should understand and ask about these conflicts because they can affect the investment advice Tiedemann provides you. Here are some examples to help you understand what that means:

Tiedemann has many clients, which means that our financial professionals may have a conflict in allocating time and investments to different clients. To address this conflict, Tiedemann has standard allocation procedures and monitors client portfolios for compliance. Tiedemann typically recommends custody of client accounts with Fidelity Brokerage Services LLC (“**Fidelity**”) and/or Charles Schwab & Co., Inc. (“**Schwab**”). Fidelity and Schwab provide certain support services related to the transition of client accounts to Tiedemann. You do not pay more because of these arrangements, but Tiedemann benefits as these costs are not borne by Tiedemann. For additional information about our conflicts of interest, please read Items 5, 11, 12 and 14 of Tiedemann’s [Form ADV Part 2A Brochure](#).

**Conversation Starter** - *How might your conflicts of interest affect me and how will you address them?*

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**How do your financial professionals make money?**

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Tiedemann pays our financial professionals a base salary and discretionary bonus that do not depend on the advisory services in which you enroll or the Funds in which you invest. Our financial professionals compensation varies based on several factors, including client service as well as acquiring and retaining client assets. We also do not pay investment professionals based on assets under management; rather, the more consistent their investment performance is, the higher their compensation opportunity.

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**Do you or your financial professionals have legal or disciplinary history?**

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No, Tiedemann and our financial professionals do not have legal or disciplinary history. Additional information can be found in Item 9 of our [Form ADV Part 2A Brochure](#). Please visit [Investor.gov/CRS](http://Investor.gov/CRS) for a free and simple search tool to research Tiedemann and our financial professionals.

**Conversation Starter** - *As a financial professional, do you have any disciplinary history? For what type of conduct?*

**Additional Information**

Please contact us at (212) 396-5900 or [Compliance.USWM@alti-global.com](mailto:Compliance.USWM@alti-global.com) for additional information about Tiedemann’s investment advisory services or to request a copy of this relationship summary.

**Conversation Starter** - *Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?*

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