

## 2024 BELPOINTE ASSET MANAGEMENT LLC - PRIVACY NOTICE

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|--------------|---|
| <b>FACTS</b> | It is important to understand how Belpointe Asset Management, LLC (“Belpointe”) handles the sharing and privacy of your Nonpublic Personal Information (“Personal Information”).  |
| <b>Why?</b>  | Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some, but not all, sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. Please read this notice carefully to understand what we do.  |
| <b>What?</b> | <p>The types of nonpublic personal information we collect and share may include:</p> <ul style="list-style-type: none"> <li>• Name, mailing address and email address</li> <li>• Social security number</li> <li>• Investments and account balances</li> <li>• Information about your financial situation, including your employment or occupation, banking information, and other financial and tax information.</li> </ul> <p>When you are no longer our customer, we continue to share your information as described in this notice.</p> |
| <b>How?</b>  | All financial companies need to share customers’ Personal Information to transact everyday business. In the section below, we list the reasons financial companies can share their customers’ personal information, we identify the ways Belpointe shares your information, and whether you can limit our sharing of your Personal Information.   |

| Reasons to share your Personal Information  | Does Belpointe share? | Can you limit this sharing? |
|---|-----------------------|-----------------------------|
| <b>For our everyday business purposes -</b><br><i>Such as to manage your account(s), provide advice, respond to court orders and legal investigations</i> | Yes                   | No                          |
| <b>For our own marketing purposes -</b><br><i>To offer our products and services to you</i>   | Yes                   | No                          |
| <b>For joint marketing with other financial companies</b>   | No                    | We don’t share              |
| <b>For our Affiliates’ everyday business purposes</b>   | Yes                   | No                          |
| <b>For our Affiliates to market to you</b>  | No                    | We don’t share              |
| <b>For Non-Affiliates to market to you</b>  | No                    | We don’t share              |

| Who we are                           |                                 |
|--------------------------------------|---------------------------------|
| <b>Who is providing this notice?</b> | Belpointe Asset Management, LLC |

## Steps we take to protect your Personal Information

|  |   |
|--|---|
| <b>How does Belpointe protect your personal information?</b> | To protect your personal information from unauthorized access and use, we have adopted security measures and procedures designed to comply with federal law to prevent unauthorized use or access to your Personal Information. These measures include computer safeguards and secured files and buildings. We limit access to your personal information to appropriate personnel with a business need for it. We educate our personnel on how to protect your information. |
| <b>How does Belpointe collect your personal information?</b> | We collect your personal information, for example, when you <ul style="list-style-type: none"><li>• Open an investment account</li><li>• Give us your contact information</li></ul>   |
| <b>Why can't we limit all sharing?</b>                       | Federal law gives you the right to limit only: <ul style="list-style-type: none"><li>• Affiliates from using your information to market to you</li><li>• Sharing for nonaffiliates to market to you</li></ul> State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.   |

## Definitions

|                       |  |
|-----------------------|--|
| <b>Affiliates</b>     | Any Company related to Belpointe by common ownership or control.     |
| <b>Non-affiliates</b> | Any Company not related to Belpointe by common ownership or control. |

## Questions?

Contact your Investment Advisor Representative or:

- Call: (203) 629-3300
- Email: [compliance@belpointeasset.com](mailto:compliance@belpointeasset.com)
- Mail: Belpointe Asset Management, LLC, PO Box 17101, Reno, NV 89511

## Important information related to the sharing of your Personal Information with your Investment Advisor Representative

We understand that your relationship with your Investment Advisor Representative is important to you and we respect that.

If you would like to limit the Personal Information that your Investment Advisor Representative could disclose or take if they move to another investment advisory or brokerage firm, please complete and email the form below to [compliance@belpointeasset.com](mailto:compliance@belpointeasset.com) or return via regular

mail to the address above. You can withdraw your opt-out choice at any time by contacting us in writing at the addresses provided above.

If your primary address is in a state that requires your affirmative consent to share your personal information with the New Firm, then you must give your written consent before we will allow your financial advisor to take any of your personal information.

If you would like to limit the Personal Information that your Investment Advisor Representative could disclose or take if he or she moves to another investment advisory or brokerage firm, please email us at [compliance@belpointeasset.com](mailto:compliance@belpointeasset.com), call us at (203) 629-3300 or complete and mail the form below to:

Belpointe Asset Management, LLC  
P.O. Box 17101  
Reno, NV 89511  
Attn: Compliance Department

You can withdraw your opt-out choice at any time by contacting us in writing at the address provided above.

If your primary address is in a state that requires your affirmative consent to share your personal information with the New Firm, then you must give your written consent before we will allow your financial advisor to take any of your personal information to that New Firm.

Please be aware that Belpointe entered into the Protocol for Broker Recruiting (Protocol) on April 7, 2017 with certain other brokerage firms, and if Belpointe remains a signatory to the Protocol as of the effective date of your investment advisor representative's termination from Belpointe, then Belpointe will permit your financial advisor to take your name, address, phone number, email address and the account title of the accounts serviced (or additional information as permitted if the Protocol is amended) while your financial advisor was associated with Belpointe if your advisor joins one of these Protocol firms. The retention of this limited information by your advisor under the Protocol may occur even if you have exercised your rights to limit information sharing as described above.

### **Regarding CA and VT**

Vermont: Except as permitted by law, we will not share personal information we collect about Vermont residents with Non-affiliates unless you provide us with your written consent to share such information.

California: Except as permitted by law, we will not share personal information we collect about California residents with Non-affiliates and we will limit sharing such personal information with our Affiliates to comply with California privacy laws that apply to us.

## Opt-Out Election

By completing and returning this form below, as described, I am instructing Belpointe to limit the personal information about me that my Investment Advisor Representative could disclose or take if he or she moves to another brokerage or investment advisory firm and terminates the relationship with Belpointe. However, I understand that Belpointe may disclose my name, address, telephone number, email and the account title of the accounts serviced by my advisor to the new brokerage or investment advisory firm as allowed under federal and certain state laws and the Protocol.

Please note that for accounts held jointly by two or more persons, the privacy choices made by any account holder apply to all joint holders with respect to the account. In order for your opt-out election to be effective, you must complete ALL of the following information:

In order for your opt-out election to be effective, you must complete ALL of the following information and return it to Belpointe Asset Management, LLC PO Box 17101, Reno, NV 89511 Attn: Compliance Department:

Name (please print clearly) \_\_\_\_\_

Address \_\_\_\_\_

City State/Zip \_\_\_\_\_

Phone Number \_\_\_\_\_

Investment Advisor Representative Name \_\_\_\_\_

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date