Our Commitment to Keeping Your Information Secure

PERSONAL WEALTH ADVISORY BY
Laird Norton Wetherby

At Laird Norton Wetherby (LNW), protecting your personal and financial information is a responsibility we take seriously. We use multiple layers of safeguards, technology, processes, independent oversight, and employee training, to help protect your data and maintain the trust you place in us.

This overview explains, in plain language:

- How LNW works to keep your information secure
- How our custodial partners support data protection
- Simple, practical steps you can take to help protect yourself

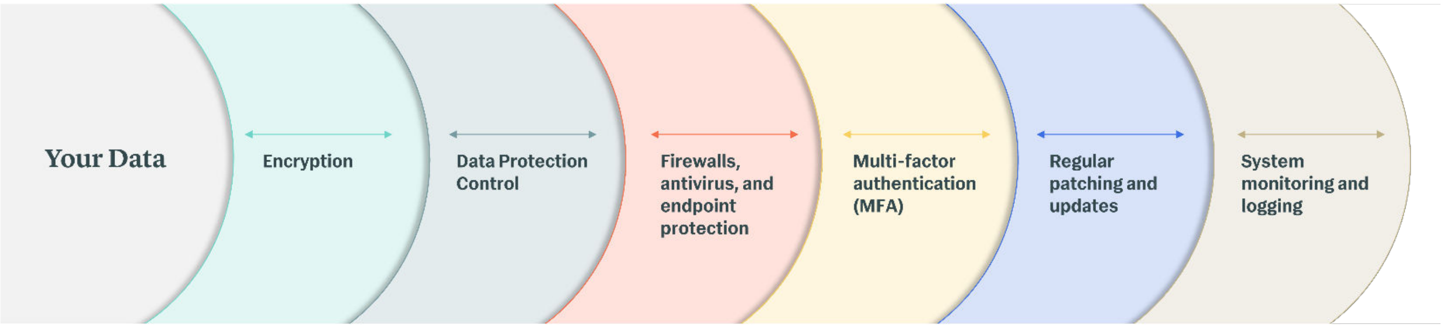
How LNW Helps Protect Client Data

We take a defense-in-depth approach, meaning we rely on multiple, overlapping protections rather than a single control.

1. Technology Safeguards

LNW uses modern security technologies designed to help prevent unauthorized access, detect suspicious activity and protect sensitive data:

- Encryption to help protect data in transit and at rest
- Multi-factor authentication (MFA) for an added layer of login security
- Firewalls, antivirus, and endpoint protection across our systems
- Data protection controls to help prevent unintended exposure
- Ongoing monitoring to detect unusual or suspicious activity
- Regular system updates and patching to address emerging vulnerabilities



2. Access Controls and Internal Oversight

Access to client information is limited to authorized personnel who need it to perform their roles:

- Role-based access controls
- Formal access reviews and approvals
- Ongoing risk tracking through an internal risk register
- Oversight by internal information security team

3. Ongoing Testing, Audits, and Reviews

To help ensure our safeguards remain effective, LNW participates in ongoing assessments, including:

- Periodic IT audits and penetration testing
- Regulatory IT examinations
- Regular reviews of policies, procedures and controls
- Ongoing review of key vendors and service providers to help ensure they meet our security and data protection standards
- Continuous improvement based on evolving risks

4. Employee Training and Awareness

Our people are a critical part of keeping data secure. LNW team members receive:

- Annual cybersecurity and privacy training
- Ongoing education on phishing, spoofing, and social engineering
- Required participation in firm-wide security awareness programs
- A documented and tested business continuity and incident response plan

How Our Custodial Partners Support Security

LNW works with established custodial partners that maintain robust cybersecurity and business continuity programs. These custodians take a holistic approach to data security, focusing on multiple safeguards working together to help protect firm and client information.

Key areas of focus typically include:

- Physical safeguards to protect data centers and critical systems
- Network and application security controls, including encryption and intrusion detection
- Reliability monitoring and capacity planning to support system stability as activity grows
- Disaster recovery and business continuity planning to help ensure ongoing access to critical services

This layered approach is designed to support the confidentiality, integrity, and availability of client information.

How You Can Help Keep Your Information Safe

Security is a shared responsibility. A few simple habits can significantly reduce your risk.

Be Alert to Common Threats

- **Phishing:** Emails or texts designed to steal login credentials or personal information
- **Spoofing:** Fake messages that appear to come from a trusted organization or individual
- **Social engineering (including AI-generated voice or video impersonation):** Attempts to gain trust and persuade you to share information, move money or take action

Smart Safety Tips

- Pause and verify if something feels unexpected, urgent or unusual—even if it appears to come from someone you know
- Use an established, trusted channel to confirm requests involving money movement, account changes, or sensitive information
- Avoid clicking links or attachments you weren't expecting
- Hover over links to preview URLs before clicking
- Use strong, unique passwords (12–16 characters)
- Enable multi-factor authentication (MFA) whenever possible, especially for email
- Monitor your accounts regularly and report unusual activity

Sharing Information with LNW

- Use the secure LNW client portal when sharing sensitive information

- Expect verification calls from us for money movements or account changes

- LNW will not request sensitive information via social media or unofficial email addresses

If You're Ever Unsure

If you have questions about a message that appears to come from LNW, or believe you may be the target of a scam, please contact your advisory team using known, trusted contact information.

Helping protect your information is part of delivering the peace of mind you expect from LNW.

ABOUT THE AUTHOR

Robert Trinchet, Managing Director Technology is responsible for ensuring that LNW's IT systems and procedures are best-in-class and provide clients and employees with the best possible user experience. On an ongoing basis, he and his team design and implement technology solutions to keep LNW client information secure and enhance account management, analysis and reporting. With nearly two decades of experience in IT and financial services, Robert is well-suited to be data-steward at a firm that seeks customized solutions to problems both financial and technical.

ABOUT LNW

LNW Advisors services support exceptional families and individuals seeking to activate the full potential of their wealth. To help turn lifetime ambitions and multigenerational aspirations into reality, Laird Norton Wetherby (LNW) brings to each client a high level of care combined with deep expertise in wealth and legacy planning, investments, and trust and estate services.

Offering both RIA (registered investment advisor) and trust services, LNW is committed to providing clients with unbiased, independent guidance and solutions. LNW has offices in Seattle, San Francisco, New York, Los Angeles and Philadelphia, as well as an affiliated trust company in South Dakota, empowering clients across the U.S. and around the world.

LNW is owned by employees and majority owned by Laird Norton Company, one of the longest-sustained family enterprises in the United States. To learn more, please visit LNWAdvisors.com

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