

Redefining Wealth Management Through A Fully Integrated Platform

An Interview with Jason Ozur, CPA, Founding Partner and Chief Executive Officer, Lido Advisors

EDITORS' NOTE Jason Ozur is Founding Partner and Chief Executive Officer of Lido Advisors. He also serves as Co-Chair of Lido's investment committee. He is responsible for the management of Lido's alternative investments and is an integral part of the firm's due diligence on real estate orientated strategies. Ozur started his career as a CPA performing audits, preparing tax returns, and providing back-office services for numerous hedge funds. In 1999, he joined a large family investment office, where he was on the investment team that managed the family's substantial investments and served as CFO of its worldwide water conservation company that did business in over 22 countries. He also provided financial oversight as controller of a multi-billion-dollar Los Angeles based hedge fund. Ozur earned a BS degree from California State University at Northridge.



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firm's in-house investment capabilities and extensive network removes barriers to specialized investments once beyond the reach of most investors.

How do you define Lido's mission and purpose?

Wealth management is more than simply managing money. It is a life-long journey that touches nearly every aspect of a client's life, from personal milestones to legacy planning. At Lido, we embrace the profound responsibility of guiding clients through this jour-

ney with care and expertise. Our mission is to provide deeply personalized and sophisticated wealth management solutions that empower clients to achieve both their financial and personal goals. We deliver this through a comprehensive suite of services, including investment management, financial and estate planning, tax consulting, and trust services, all through the Lido network.

We see ourselves as a trusted partner and the central coordinator of our clients' financial lives, bringing together the right expertise to address their most complex needs. This approach builds on our signature family office style, which takes the best practices of dynamic ultra-wealthy families and delivers them in a hyper-personalized way for each client. By combining trust, integrity, and customized value creation, we strive to build lasting relationships that stand the test of time.

Will you provide an overview of Lido's platform?

Lido offers a fully integrated wealth management platform through what we call the Lido One model. This approach brings together comprehensive wealth and investment management, financial and estate planning, tax consulting and preparation, trust services, and a proprietary investment platform that includes both traditional and alternative investments. Our approach is particularly well suited for ultra-high-net-worth clients and complex family structures. We serve as the central point of coordination, seeking to ensure that every aspect of a client's financial life is thoughtfully aligned and fully optimized. Through Lido One, we seamlessly connect professionals from multiple disciplines to collaborate across every area of a client's financial life. In addition to this integrated structure, we provide in-house investment expertise and maintain an extensive network that opens access to specialized investments, including alternatives, that have historically been unavailable to most investors.

How do you define the Lido difference?

We believe that the Lido difference lies in both our origins and our execution. We were founded on a trust-based family office model, which shapes our holistic, client-first approach. We distinguish ourselves by offering institutional-grade alternative investments and bespoke financial solutions tailored to each client's unique circumstances. Equally important is

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our culture. Lido is not built on a traditional pyramid with ownership concentrated at the top. Instead, we have cultivated a firm of shared ownership that will soon include more than two hundred shareholders and continues to grow. This broad-based equity structure strengthens collaboration, incentivizes excellence, and fosters enduring client relationships.

The family office model is defined by a highly personalized, proactive, and sophisticated approach to wealth management that addresses the complex needs of high-net-worth families and individuals. Historically, this model was available only to the wealthiest families in the world. Since our founding in 1999, Lido has worked to change that reality by delivering the benefits of this model to clients across the country.

Will you discuss Lido’s strength and commitment to thought leadership and research?

Our commitment to thought leadership is woven into every aspect of our work. From alternative investments to estate planning strategies, we focus on delivering value through insights rather than simply offering products. My background as a CPA and my experience in a family office have shaped our forward-looking, research-driven approach. We do not enter meetings with a predetermined agenda. Instead, we listen, analyze, and then deliver well-researched, client-specific solutions designed to achieve each client’s goals. This mindset is embedded across our team and reinforced

through continuous internal development as well as strategic partnerships, including our relationship with Charlesbank Capital Partners and HPS Investment Partners, our two private equity sponsors.

How critical has it been to build the Lido team?

Building the right team has been essential to Lido’s success. From the beginning, I have believed that the most valuable assets in any service firm are its people and its culture. This is why we have focused not only on hiring exceptional talent, but also on creating a culture of ownership and long-term alignment. We look for individuals who excel in their technical expertise and who also share our values and our commitment to outstanding client service.

Our growth is directly tied to our people, many of whom have been with us since the early stages of their careers. Their development and success are central to Lido’s identity, and we invest heavily in their futures, including encouraging equity participation to promote shared success. This approach has fostered loyalty, deep institutional knowledge, and a strong sense of collective purpose that sets Lido apart.

What do you see as Lido’s responsibility to community engagement and to building a better world?

At Lido, we believe our responsibility extends beyond financial performance. Building a better world begins with how we treat our people, our clients, and our communities. Our model of broad-based ownership fosters

inclusivity and alignment, while our holistic approach to client service helps families build lasting legacies. We view wealth not only as a tool for individual success, but also as a resource that can uplift others and create long-term positive impact. We are committed to contributing meaningfully to the communities we serve. As we continue to grow, we remain dedicated to initiatives and partnerships that reflect our values of integrity, empathy, and long-term stewardship. This includes supporting local organizations, encouraging employee volunteerism, and working with partners who share our commitment to responsible leadership.

What advice do you offer to young people beginning their careers?

Start by investing in a strong foundation. While I do not currently maintain an active license, my career began in accounting. The training I received as a CPA has been invaluable at every stage of my journey, from understanding complex investments to navigating family dynamics and building a scalable business. Be curious, seek out learning opportunities, and surround yourself with people who will challenge and support you. Mentorship has played a vital role in my own career, and I believe strongly in both learning from others and guiding those who follow. Most importantly, do not simply chase success; find purpose in what you do. Many of our team members began their careers at Lido, and it has been deeply rewarding to see them grow into leaders. If you commit to excellence, embrace a growth mindset, and maintain humility, opportunities will follow. ●

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