



Liberty Group Affiliated Entities

Liberty Group, Holdings, Inc., a privately held company formed on December 1, 2021, under the State of Nevada laws, operates a range of businesses through controlled entities (i.e., affiliated businesses under common ownership, control, or operation), collectively referred to as Liberty Group (LG). David J. Hollander is the principal owner of Liberty Group Holdings, Inc.

LG's affiliated entities are as follows:

- ❖ [Hollander & Hollander, PC](#) - a law firm
- ❖ [Liberty Alternative Asset Management, LLC](#) - a privately held company formed to invest in the interests of another fund, the Citizen Energy Partners Opportunities Fund I, L.P.
- ❖ [Liberty Tax Planners, LLC](#) - an affiliated firm offering tax preparation services
- ❖ [Lifetime Planning Marketing, Inc. DBA Lifetime Insurance Marketing \(CA # 0F17020\)](#) - an insurance field marketing association offering insurance products and services
- ❖ [Liberty Wealth Management, LLC DBA Liberty Group](#) - an SEC-registered investment adviser

A more detailed description of each company follows:

[Hollander & Hollander, PC](#)

Hollander & Hollander, PC (H&H), a privately held company formed on June 13, 2008, and organized as a professional corporation under California laws, offers legal services including but not limited to estate and wealth transfer planning, estate and trust administration and litigation, business succession and charitable planning, family foundations, elder law, tax planning, and probate. David J. and Sheila B. Hollander own H&H equally.

[Liberty Alternative Asset Management, LLC](#)

David Hollander is the Manager of Liberty Alternative Asset Management, LLC (LAAM), a privately held Delaware limited liability company formed on April 29, 2021, to allow Clients to invest in the interests of Citizen Energy Partners Opportunities Fund I, L.P. (Citizen Fund), a Delaware limited partnership. The Citizen Fund was formed by Citizen Energy Partners Opportunities Fund I GP, LLC (Citizen Fund GP), a Delaware limited liability company, to acquire or participate in developing non-operated working interests in oil and gas wells. CEP Investment Management, LLC, Citizen Fund's investment manager, is responsible for the day-to-day management of Citizen Fund.

[Liberty Tax Planners, LLC](#)

Liberty Tax Planners, LLC (LTP), a privately held company formed on October 1, 2021, and organized as a limited liability company under California laws, offers tax preparation services. David J. Hollander principally owns LTP.

[Lifetime Planning Marketing, Inc.](#)

Lifetime Planning Marketing, Inc. DBA Lifetime Insurance Marketing, CA# 0F17020, (LPM), a privately held company formed on February 27, 2006, and organized as a limited liability company under California laws, is an insurance field marketing association offering insurance products and services. David J. Hollander principally owns LPM.

[Liberty Wealth Management, LLC](#)

Liberty Wealth Management, LLC DBA Liberty Group (LWM) is an investment advisor registered with the Securities and Exchange Commission pursuant to the Investment Advisers Act of 1940. The firm, located at 411 30th Street, 2nd Floor, Oakland, CA 94609, has been in business since March 1998 and SEC-registered since January 19, 2018. LWM is wholly owned by its Principal and President, David J. Hollander. There are no revenue-sharing arrangements between LWM and LG affiliates.