

# CHALLENGES & OPPORTUNITIES:

*Why Asia's UHNW Entrepreneurs & Investors Aren't Facing Them Alone*



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## Why Are UHNI Joining Peer Groups?

- To find a close-knit, confidential group of true peers for unbiased feedback.
- To discuss topics they can't discuss with anyone else, including "softer" topics like family dynamics.
- For accountability; many Members don't have the opportunity to have the mirror held up to them in a respectful, constructive way.
- To eliminate blind spots and learn from other Members' mistakes.
- To rediscover meaning, purpose, and joy after creating significant wealth.

## What Topics Are UHNI Discussing in Their Groups?

- Becoming a better investor and a better steward of wealth, with the realization that wealth isn't just about the individual. It's about their families and next generation(s).
- Opportunities to deploy capital and analyzing deals with their peers.
- Navigating macro and micro shifts to the global economy.
- Finding the balance between active and passive investing, with frameworks to monitor their portfolio.

## A Common Theme: Multi-Generational Family Dynamics

- Third- and fourth-generation family members look to their Group for guidance as they transition multi-generational businesses in new directions.
- First-generation wealth creators often discuss how to raise kids with great values who will be productive contributors.

## Comparing Peer Group Organizations: YPO and TIGER 21

- YPO is more focused on wealth creation. TIGER 21 is focused on preservation—how to be a better steward of wealth.
- YPO Forums are peer-led, while TIGER 21 Meetings are led by Chairs, professional trained facilitators who amplify the collective experience.
- TIGER 21 offers the opportunity to attend Meetings anywhere in the world.

## The Portfolio Defense: A Signature TIGER 21 Offering

Provides Members the opportunity to:

- Examine their portfolio in the context of their life story, wealth journey, and legacy.
- Leverage the undivided attention of their personal board of directors.
- Stay accountable to their goals & priorities, with regular follow-up from the Group.
- Examine all areas of their lives: their portfolio, their health and wellness, their estate, their philanthropic activities, and their legacy.

## How Are Members Using TIGER 21 Tools and Resources?

- T21 Connect Members-Only App – To connect with Members globally who have mutual interests and specific expertise. (Example: investing in olive oil orchards.)
- T21 Invest – To find quality deals promoted or co-sponsored with fellow Members. (TIGER 21 is a non-solicitation environment. T21 Invest is an opt-in area where sharing deals is explicitly permitted.)
- Asset Allocation Dashboard – To compare how Members are investing across different subsections of the community.

# WHERE SUCCESS BECOMES MORE MEANINGFUL—AND IMPACTFUL

Being a Member of TIGER 21 is like having your own personal board of directors, powered by the collective intelligence of a confidential group of exceptionally successful wealth creators. TIGER 21 delivers a full range of *learn, access, connect* programs and resources to help Members discover their path forward.



## LEARN

Attend **candid and invaluable monthly Group Meetings** with up to 15 peers who become trusted confidantes. Topics discussed include investment opportunities, legacy planning, wealth preservation, the next generation, health and wellness, travel, and philanthropy.

Explore your holdings in a **transformative Portfolio Defense®**, gain insight into your investments and finances, and build action plans to maximize wealth preservation.



## ACCESS

Access **one-of-a-kind experiences**, take advantage of exclusive Member benefits, and enjoy trips like DISCOVER Lisbon, EXPLORE India, and the Women of TIGER 21 Retreat.



## CONNECT

Connect with fellow Members and expert thought leaders across the globe, both in person and virtually.

Global Exchange, our annual Member conference, offers the opportunity to **exchange insights with fellow Members** in person and uncover new perspectives in yourself, in health, in family, in philanthropy, in your portfolio, and in your global community.

TIGER 21 Networks **bring Members together around shared interests** through the T21 Connect App and website. Members discuss investment and lifestyle topics, share expertise, and learn from subject matter experts.

### Local Groups

Meet in person monthly with a local ultra-high-net-worth advisory Group based in cities across the globe of up to 15 Members.

### Family Office Groups

Meet with fellow single family office principals and enjoy access to our UHNI global community.

### Global Groups

Meet up on a virtual basis with Members who are frequent travelers or those seeking geographically diverse perspectives.

**TIGER 21 Membership is by invitation only.** To learn more, visit [tiger21.com](https://tiger21.com).