

A PERSONAL BOARD OF ADVISORS:

The Value of Peer Insight



IRINA BARANOV
TIGER 21 Chair, Philadelphia



ELISE MITCHELL
TIGER 21 Chair, Nashville



BRIAN POHL
TIGER 21 Chair, London & Global

The Value of Confidential Peer Groups

"It's easier to be smart about other people's problems than your own." —Brian Pohl

- In a room of vetted peers, you can ask questions and get clear, unbiased answers that you may not be able to get from friends, family, or advisors
- A peer group can also help you make hard decisions, give you courage, and offer good counsel from experience.
- At a certain phase, you may find yourself asking different questions, which means that you need a different set of advisors.

Questions You Can't Ask Anywhere Else

"I can't really lean over the back fence and ask my neighbor this question." —Elise Mitchell

- TIGER 21 confidentiality creates the space to ask anything—financial, business, or deeply personal
- Even a "basic" question you might be afraid to ask, like "What's an ETF?" or "How does private credit work?"

Real-Life Questions from Members

- *Elise:* "How can I build a business and be a parent at the same time—and not fail at either one?"
- *Brian:* "What is the wealth for? Is it for enjoyment? Is it for good health and good education for my family, and that's it? Is it for creating something that's going to last multiple generations?"

The Portfolio Defense Experience

"The Portfolio Defense is an opportunity to get authentic and unbiased feedback on the key questions you ask."—Brian Pohl

- During their Portfolio Defense, TIGER 21 Members open up their entire investment portfolio to gather candid feedback from their Group on their assets, liabilities, income, and expenses.
- Some Members express initial concern over sharing their entire portfolio with the Group but often describe the experience as "life-changing."

"Aha" Moments Within Peer Groups

Peer insight often leads to Members reframing how they think about topics such as:

- Parenting and wealth transfer
- If/when to exit their business
- Caring for NextGen family members with special needs
- Personal purpose and "what's next"

"Being a good steward of a company is different than being a good steward of the wealth that you've built after you exit that company." —Irina Baranov

The TIGER 21 Defense Library

An opportunity for Members to explore different facets of their life with their trusted peers.

"TIGER 21 is about stewardship of your whole life." —Elise Mitchell

A TRUSTED COMMUNITY TO EXPLORE WHAT'S NEXT

TIGER 21 Members benefit from the experience and insights of their fellow ultra-high-net-worth peers in all areas of life—wealth creation, legacy, impact, family dynamics, wellness, and more. TIGER 21 delivers a full range of learn, access, connect 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 Peru, 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, TIGER 21's 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 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 UHNW global community.

Global Groups

A more flexible format for meeting on a virtual basis with trusted ultra-high-net-worth peers.

TIGER 21 Membership is by invitation only. To learn more, visit tiger21.com.