

Decision-Making in Uncertain Times: The Peer Group Perspective



TIM DANIELS
TIGER 21
President & CEO



MIKE FIELDS
TIGER 21 Chair,
Raleigh



FLORIAN KEMMERICH
TIGER 21 Chair,
Switzerland

Processing Today's Uncertainty within the TIGER 21 Community

*"The psychological challenges that come with constant change, and especially those that rear their head during inflection points, make for great discussions."
—Mike Fields*

- Investment policy statements allow some Members to remain anchored. Raleigh Members return to them during periods of dislocation.
- AI is having a global impact on organizations and people, even in Switzerland, which has been a safe haven during past periods of disruption.

AI: Investment Angles and Next Gen Questions

*"AI is closer to an industrial revolution. We're going from a knowledge economy to a creator economy because knowledge is abundant."
—Florian Kemmerich*

- Members are considering AI from several angles: investing in AI companies, in adjacent technology, and in AI components to existing businesses.
- One Group held three round-robin discussions during a recent Meeting:
 - How are you viewing AI from an investing perspective?
 - How is it affecting your business?
 - How is it impacting you personally?
- Members are also seeing AI impact the next generation, as more young people struggle to find entry-level jobs, bringing up questions of Next Gen financial support.

A Lens to Analyze the Present and Plan for the Future

*"The Qualitative portion [of the Portfolio Defense] is the lens with which you view the world. That lens should be reflected in the Quantitative side—how you invest."
—Mike Fields*

- The TIGER 21 Portfolio Defense® includes two components:
 - The Quantitative, in which Members examine their assets from a P&L and balance sheet perspective.
 - The Qualitative, in which Members share who they are, where they've come from, their perspective, and their situation, both personal and professional.
- The intersections between these don't always overlap the way Members expect, which leads to very telling Group discussions.
- Members present a yearly Defense, starting with the Portfolio Defense. In subsequent years, they can choose to explore other areas, including estate planning, health and wellness, legacy, and philanthropy.

The Role of Peer Groups During Uncertain Times

- *Tim Daniels:* "You oftentimes hear really interesting contrarian views that are swimming against the tide, which ends up being very effective and productive during these times of uncertainty."
- *Mike Fields:* "This is a very good environment to test your thesis. Everyone comes to the meeting with their own set of opinions, and most of them are well-researched."
- *Florian Kemmerich:* "It's time very well spent in a special place you don't normally find—a confidential, trusted, and deeply connected Group and experience."

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 Group Meetings** with up to 15 peers who become trusted confidants. 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 **trade 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 of up to 15 Members based in cities across the globe.

Family Office Groups

Meet with fellow single family office principals and enjoy access to our UHNW 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.