



TIGER 21

Women, Wealth, and Navigating the Road Ahead



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What the Great Wealth Transfer Means for Women

"The [wealth management] industry has prepared itself for male inheritors. Women tend to be the ones who are taking care of families, philanthropies, and so the burden is different."

—MonaLisa Como

- Cerulli Associates projects that \$124 trillion will change hands in the U.S. through 2048, with \$54 trillion expected to pass to widows through interspousal transfer, with 95%+ going to women.
- Research suggests recent widows are about three times as likely to fire their advisor, and many firms are now devoting resources to engaging women clients more effectively.

Transitioning from Founder to Investor

- Women founders, like many male founders, can feel unprepared to be investors after an exit, since many put their money back into their companies.
- Many women are juggling priorities: raising families and caring for parents, while letting go of a company that has felt like a child to them and learning how to be an investor, a philanthropist, or a board member, all at the same time.

"When I got a wealth advisor for the first time, he still spoke to my husband as if I wasn't in the room—even though I'm the one who brought the wealth to the table."

—Bonnie Speer McGrath

Topics of Conversation Among the Women of TIGER 21

"The women in the TIGER 21 community discuss a wide breadth of topics, from things that are very serious to things that are more lighthearted—or just great tips and tricks."

—Lisa Holladay

Recent topics include: Raising teenagers who know you have wealth • Financial requests from siblings • Pressure from parents • "I don't want to ruin my kids" • Experiences with a paid executor • How do you grow a business that you want to transfer to a child? • How do you organize family meetings? • When do you tell your soon-to-be boyfriend that you're wealthy? • Investing in women's medical devices • Menopause • Metabolic care • Sleep • What peptides you're using • Ideas for an upcoming Hawai'i vacation • How to onboard an executive assistant who's going to work in your home • Finding a concierge doctor for HRT

The Role a Peer Group Can Play for Women

- *Lisa Holladay:* "When you reach a certain level of success, it's hard to find people to talk to."
- *MonaLisa Como:* "We actually care about you as a whole person. For women navigating wealth, there are very few places where you can have those conversations with genuine care."
- *Bonnie Speer McGrath:* "It's one day a month for you, your family, and your future legacy. Aren't you worth it?"

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 12–15 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.