

The 3 Essential Habits Of High Net Worth Investors

Andy Hagans & Jimmy Atkinson



WEALTHCHANNEL

**The #1 private marketplace for High Net
Worth investors.**

—

WealthChannel.com

Who We Are



Jimmy Atkinson



Andy Hagans

Our mission is to help investors achieve financial freedom and **build generational wealth** for their families.



**GROW YOUR WEALTH
WITH PASSIVE INCOME STRATEGIES**

**WEALTHCHANNEL
SUMMIT**

**June 16, 2023
Fort Worth, TX**

The 3 Essential Habits Of High Net Worth Investors

- ① Have a goal. And review it annually.
- ② Think triple-net returns.
- ③ Learn every day.

Why are these three habits essential for HNWIs?

1 Have a goal. And review it annually.

- Investment Policy Statement
 - Overall Goal: Quantitative + Qualitative Goals
 - Time Horizon
 - Risk Tolerance
 - Asset Allocation
 - Tax Planning
 - Rebalancing & Review Process
- Calendar

① Have a goal. And review it annually.

Investment Policy Statement WealthChannel WorkSheet

Investment Goal

For example: "I'd like to grow my net worth from \$2M to \$10M so that I can live off of my passive income and retire early (before age 55)."

Investment Time Horizon

For example: "My investment time horizon is 20 years (before retirement), then I'd assume 30-40 years in retirement."

① Have a goal. And review it annually.

Risk Tolerance

For example: “I have a relatively low risk tolerance. I want my portfolio to be far less volatile than the S&P.”

Target Asset Allocation

For example: “50% stocks (majority domestic), 25% fixed income, 25% alternative investments.”

Wrappers, Accounts & Tax Planning

For example: “I want to max out my 401k and IRA space with my least tax-efficient investments (like bond funds); and I want to make sure my 25% allocation to alternatives includes a lot of tax-efficient investments, such as energy investments and Opportunity Zone funds. For my traditional investments (like stocks), I will use low-cost, efficient wrappers (mainly ETFs).”

① Have a goal. And review it annually.

Portfolio Rebalancing Process

For example: “I will rebalance my portfolio every 5 years (at a minimum), or annually (at a maximum) if I believe conditions warrant it.”

Portfolio & IPS Review Process

For example: “I will revisit my portfolio and IPS annually, every January.”

② Think triple-net returns.

- With every investment, mind the drag
- Fees, Taxes, Inflation
- Tax-Advantaged Accounts
- Tax-Advantaged Wrappers

③ Learn every day.

- No one cares about your money as much as you do.
- Know enough to be dangerous.
- Our favorite resources (books, podcasts, webinars, conferences, mastermind groups).

The background of the entire image is a dark, stylized photograph of a city street at night. On the left, a man with a beard and mustache, wearing a dark green blazer over a white shirt, is smiling. On the right, a bald man wearing a dark blue blazer over a white shirt is also smiling. In the center, the text 'GROW YOUR WEALTH WITH PASSIVE INCOME STRATEGIES' is written in a large, glowing green, sans-serif font. Below this, the words 'WEALTHCHANNEL SUMMIT' are written in a large, white, sans-serif font. At the bottom center, the date and location 'June 16, 2023 Fort Worth, TX' are written in a smaller, white, sans-serif font. The overall aesthetic is professional and modern, with a focus on wealth and passive income.

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What To Expect

Exclusive One-Day Event

Learn how to use passive alternative investments like the ultra wealthy.



Speaker Lineup



Erik Hayden
Urban Catalyst



DJ Van Keuren
Family Office Institute



Steven Pesavento
Vonfinch Capital



Ashley Tison
OZ Pros



Taylor Trautloff
StarPoint Properties



Peter Ciganik
GTIS Partners

Learn from and network with some of the top leaders in the alternative investment industry.

More speakers on our website.

Why Attend



- ✓ **Leverage expert knowledge** and insights that will supercharge your investments.
- ✓ **Build valuable connections** with like-minded investors and world-class professionals.
- ✓ **Uncover the strategies** that the ultra wealthy use to invest for generational wealth.

Who Should Attend

- Investors
- Entrepreneurs & Business Owners
- Real Estate Operators
- Fund Managers
- Investment Professionals

Anyone who wants to learn how to invest for generational wealth.

Topics

- Keynote: The Investor Mindset
- Wealth Development Strategies With Real Estate
- How To Invest Like A Successful Family Office
- **Workshop: The 3 Essential Habits Of High Net Worth Investors**
- Tax-Advantaged Investing Strategies: Opportunity Zones & Beyond
- and more!

Date & Venue

Friday, June 16, 2023

Hotel Drover
Fort Worth, TX

Located 25 minutes from DFW International Airport.

Discounted rooms available for conference attendees through the WealthChannel group rate.



Ticket Information

Limited tickets available.

Early Bird Sale - Save \$200 Thru
June 2nd.

General Admission

Access To Main Conference

Free Breakfast & Lunch

~~\$397~~

\$197

VIP Package

Access To Main Conference

Free Breakfast & Lunch

VIP Seating

Access To VIP Party

~~\$997~~

\$797

Special Offer This Week

Limited tickets available

This offer expires Friday, May 19th
at 11:59 PM ET.



WealthChannel.com/offer

• \$97

General Admission

Access To Main Conference
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~~\$397~~ **\$197**

• \$497

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