

YPO Investing Forums

Go Deep on Expanding & Protecting Your Wealth

An Exclusive Benefit for Members of the YPO Investing Network

June 2022



About Investing Forums

YPO's Investing Forums are exclusive to members and offer a safe place for those who have a common interest in investing and want to improve the **management, protection** and **understanding** of their **personal wealth**.

Our model entails true “peer-to-peer” groups, not involving the traditional third-party trusted advisors who are paid by the Forum member.

This group is non-conflicted by design, as no one is being paid by one another to perform specific services and input/feedback is unfiltered between members.



A Holistic Way to Grow within the Complexity of Wealth

Benefits

Participate in a confidential, integral, and safe environment where each person has a minimum level of financial balance sheet qualifications and are solving for similar types of complexity associated with wealth.

Investing Forums will empower you to:

- ✓ Discover how to manage, protect and grow your portfolio
- ✓ Explore new investments and public/private asset classes
- ✓ Plan your trust and estate
- ✓ Educate and engage the next generation
- ✓ Access bespoke products, vehicles and managers (e.g. Private Equity, Hedge Funds, Venture Capital, Private Credit, Real Estate)
- ✓ Learn about issues related to wealth creation, preservation, planning and more



Originally Launched in April 2019

- ▶ Grew to 500+ global YPO members across 43 Investing Forums in 3 years (as of June 2022).
- ▶ The YPO Investing Network is excited to have created a true forum experience for network members in a specific physical geographic area or virtually, who have a common interest in investing and want to improve the management, protection and understanding of their personal wealth.
- ▶ Under the umbrella of YPO, an Investing Forum is a confidential, integral, and safe environment where each person has a minimum level of financial balance sheet qualifications and are solving for similar types of complexity associated with wealth.
- ▶ The idea is to have a true “peer-to-peer” group who are not the traditional third-party trusted advisors who are paid by the forum member. This group is non-conflicted by design as no one is being paid by one another to perform specific services and input/feedback is unfiltered between members.
- ▶ An Investing Forum will give members access to investment products/vehicles/managers that might otherwise not be accessible (e.g. Private Equity, Hedge Funds, Venture Capital, Private Credit, Real Estate).
- ▶ Our community helps members learn about issues related to wealth creation, preservation, estate planning, next generation education and a working knowledge of multiple public/private asset classes.



Focused on Investing & Other(s)

- ▶ Investing Forums are designed to create confidential settings for members to share and learn about investments in a trusted and non-confrontational in person and/or video-based meetings. Each forum makes their own decisions on meeting norms.
- ▶ Investing Forums are intended to address matters related to wealth preservation and creation through indirect (LP situations), their own business investing, the public markets, private equity, venture capital, hedge funds and other alternative asset classes.
- ▶ Investing Forums are not a substitute for traditional forums but intended to be complimentary to the learning experience – where wealth and family dynamics are equally discussed alongside personal and business topics.
- ▶ Investing Forums can decide to share updates around investments and/or other wealth related topics.
- ▶ Number of members to get going is 6 to 8 after which the increased membership (who, when, how) to be determined by the forum exclusively, though an ideal number of members might be as high as 12. A bigger forum allows for potentially higher quality speakers/phone-in resources and compensate for some inevitable missed attendance.



Membership Criteria

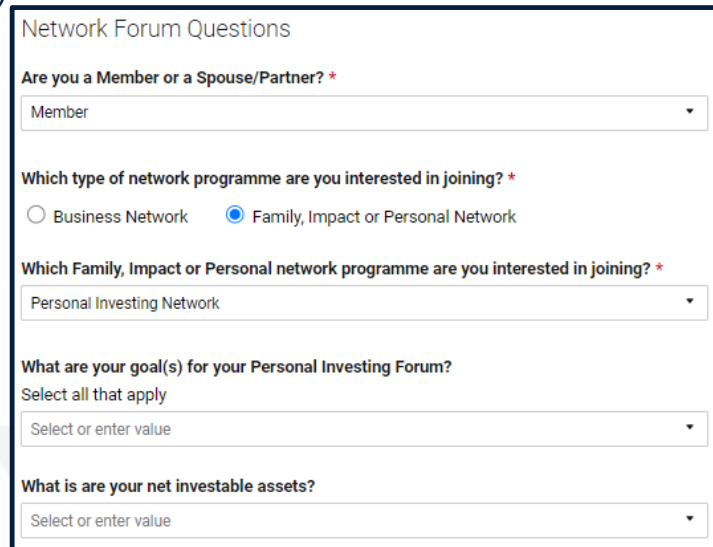
- ▶ Investing Forums are open to any member of the YPO Investing Network.
- ▶ As with all YPO forums, each Investing Forum (its Founders and Members) will determine its own norms and qualifications (e.g. accredited investor, qualified purchaser, frequency of meetings, ratio of in-person/virtual, minimum assets, what each member is ultimately seeking from the experience, etc.).
- ▶ Expect active participation, doing the needed “homework” with the biography and resources provided, and having a desire to contribute and share with others.
- ▶ THIS IS NOT AN INVESTMENT CLUB EXPERIENCE – all forum mates are regarded equal when walking into the forum regardless of the size of personal balance sheet and expected to show up, contribute time, attention, input and educational resources.

[Request to Join](#)



How to Join an Investing Forum

1. YPO members looking to connect in a specific physical geographic area or virtually are kindly asked to submit their interest through our Networks Forum Sign-Up portal.
2. First select that you are a member, then select 'Family, Impact or Personal Network' followed by 'Personal Investing Network.' (Screenshot example below.)



Network Forum Questions

Are you a Member or a Spouse/Partner? *

Member

Which type of network programme are you interested in joining? *

☐ Business Network ☒ Family, Impact or Personal Network

Which Family, Impact or Personal network programme are you interested in joining? *

Personal Investing Network

What are your goal(s) for your Personal Investing Forum?

Select all that apply

Select or enter value

What is are your net investable assets?

Select or enter value

Additional Steps

- From there, you will be asked to share your goals for joining an Investing Forum and what your net investable assets (unless you choose not to disclose).
- Continue to fill out the remaining fields on the sign-up form, providing as much information as possible, in order to be strategically placed in a Forum group designed to meet your needs.
- Be sure to press 'Submit' on the sign-up form. A Forum Administrator will be in contact with you for next steps.



Please Note:

- ▶ As with all YPO forums, each Investing Forum (its Founders and Members) will determine its own norms and qualifications (e.g. accredited investor, qualified purchaser, frequency of meetings, ratio of in-person/virtual, minimum assets, what each member is ultimately seeking from the experience, etc.).
- ▶ Active participation is expected, including completing necessary pre-or-post reads (with resources provided).
- ▶ This is not an 'Investment Club' experience. All Forum mates are regarded equal when walking into the Forum (regardless of the size of personal balance sheet) and are expected to contribute time, attention, input and educational resources.

Support

YPO Investing Forum Leadership

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