



TIGER 21

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TIGER 21 Leaps into Canada

Premier U.S. peer-to-peer learning group for high net worth investors comes to Canada

Vancouver, Canada and New York, USA, July 21, 2010 – TIGER 21, the premier peer-to-peer learning network for high net worth investors in the United States, is expanding to Canada with groups slated to debut in Vancouver, Calgary, Toronto and Montreal.

TIGER 21, an acronym for The Investment Group for Enhanced Results in the 21st Century, harnesses the collective intelligence of the super-affluent, which meet monthly in groups of 10 to 14 people to exchange investment ideas and share personal experiences on a broad range of wealth-related issues.

Frequent topics include wealth preservation, issues of wealth transference, and investment strategies, as well as family dynamics influenced by wealth. In the U.S., the group has approximately 140 members who collectively manage over \$10 billion USD in investable assets. Among other criteria, individuals require \$10 million CAD in investable assets to qualify for membership.

With Canada's high net worth population exceeding 251,000 individuals and more than 30,000 with more than \$10 million CAD in assets[†] — 4,000 of whom have over \$30 million CAD in assets — there is an untapped opportunity for this group of investors to become involved with TIGER 21.

“Whether successful entrepreneurs, CEOs, inventors or top corporate professionals, we’ve identified a segment of the ultra-wealthy in Canada who share the same basic desire to become better stewards of their wealth,” said Michael Sonnenfeldt, TIGER 21’s founder and chairman.

“Ultra-affluent individuals join TIGER 21 because they recognize that the same exceptional skills they used to grow their businesses don’t necessarily translate into successfully managing one’s personal assets.

“There is a built-in need among Canada’s wealth creators for a nurturing organization like TIGER 21, where lessons are shared in a confidential setting and members receive access to unbiased advice from their peers as well as insights from some of the brightest minds in the financial industry through select presentations,” said Sonnenfeldt.

TIGER 21 is assembling a team to develop groups in Vancouver, Toronto, Calgary and Montreal. Discussions have already been underway with interested member candidates and expectations are to have one group in each city begin meeting in the first quarter of 2011. Canadian membership will be capped at a total of 56 members for the first two years. Since privacy and confidentiality is of utmost importance to the member experience, all candidates are carefully vetted. The Canadian groups will be professionally facilitated and maintain the same high standards as their American counterparts.

“High net worth individuals join TIGER 21 because they understand that investing and wealth preservation is a lifelong learning process,” explained TIGER 21’s president Jonathan Kempner.

“Through regular meetings, member-only events and even on our own Intranet, members are able to



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interact with each other, share opportunities and have frank discussions on almost any issue of interest to high net worth investors.

“Members know they are getting honest and credible advice from peers with very diverse backgrounds and areas of expertise, something they typically don’t receive from even the most trusted financial advisor.”

Kempner further explained that TIGER 21’s expansion into Canada not only introduces the TIGER 21 process into Canada, it also has the effect of expanding the entire TIGER 21 member network.

“A member in New York will have exposure to ideas, insights and potential investment opportunities from a member in Vancouver,” said Kempner. “Our focus is to provide a forum whereby our members exchange best-of-breed ideas and investment strategies on the opportunities, challenges and responsibilities of wealth no matter where they are located. Each member we add increases the member network exponentially.”

TIGER 21 meetings consist of several distinct sessions, each designed to broaden members’ knowledge of investing and to show how world events and personal issues can impact investment portfolios.

Central to this model is the regularly held *portfolio defense session*, where one member presents their personal balance sheet, income statement and financial goals in context with the larger events in their lives for review and analysis by the group’s members. Members give advice based on their knowledge of the presenting member’s likes and propensities, a knowledge that is built through regular contact and discussion of issues with each other.

“The process can be extremely personal, but entirely rewarding,” continued Kempner. “Members are encouraged to be as candid as possible about individual and family issues that might weigh heavily on their investment choices. Members who experience the portfolio defense say that TIGER 21 has no equivalent for getting to the core of their investment strategies.”

Another benefit of TIGER 21 membership is access to some of the world’s leading financial experts. Some of the most renowned financial writers, private equity investors, portfolio managers, and hedge fund principals regularly make presentations on a broad host of investment issues, including potential opportunities for well-vetted investments.

Past presenters have included William Ackman of Pershing Capital Management, Izzy Englander of Millennium Management LLC, Renaissance Capital founder James Simons, cofounder of Blackstone Group Stephen Schwarzman, David Rubenstein of the Carlyle Group, T. Boone Pickens, Carl Icahn, and best-selling financial writers, including Ron Chernow, James Stewart and James Surowiecki, among a host of other investment industry luminaries.

For additional information on TIGER 21 Canada, visit www.tiger21.com/canada



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About TIGER 21:

TIGER 21 (The Investment Group for Enhanced Results in the 21st Century) is North America's premier peer-to-peer learning network for high net worth investors. TIGER 21 has approximately 140 members investors with groups in seven cities across the United States who collectively manage over \$10 billion USD in investable assets. TIGER 21 focuses on improving investment acumen as well as exploring common issues of wealth preservation, estate planning and family dynamics beyond finance. Founded in 1999 by Michael Sonnenfeldt, TIGER 21 is headquartered in New York City and has groups in Los Angeles, San Francisco, San Diego, South Florida, and Dallas, as well as a group forming in Washington, DC. More information can be found at www.tiger21.com.

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† Merrill Lynch Capgemini 2010 World Wealth Report