



# TIGER 21

# FACT SHEET

## WHO WE ARE

TIGER 21 (The Investment Group for Enhanced Returns in the 21st Century) is the nation's premier peer-to-peer learning network for high net worth investors. TIGER 21 Members collectively manage over \$10 billion in investable assets. Members are entrepreneurs, CEOs, inventors and top executives with backgrounds in financial services, real estate, industrial and consumer goods, legal services, entertainment and medicine. The TIGER 21 learning experience centers on improving the Members' investment acumen as well as exploring common issues of wealth preservation, estate planning and family dynamics.

TIGER 21 Members collectively manage over 10 billion dollars in investable assets.

The annual membership fee is \$30,000.

We actively support our Members in transitioning from managing their businesses to managing their own personal wealth and becoming better managers of those who oversee their assets. In order to join, each Member must have a minimum of \$10 million in investable assets and pay an annual membership fee.

Founded in 1999, TIGER 21 is headquartered in New York City and has groups in Los Angeles, San Francisco, San Diego, Palm Beach, Miami, and Dallas.

## EXPERIENCING TIGER 21: THE POWER OF COLLECTIVE INTELLIGENCE

TIGER 21 Members, who have risen to exceptional heights within corporations or as entrepreneurs and have built and sold successful businesses, join TIGER 21 because they recognize these same business skills do not translate into successfully managing one's personal assets. Participating in professionally facilitated 10-12 person groups, our Members meet monthly to enhance their investment expertise and build collective intelligence in high energy, day-long sessions. These meetings are supplemented by a Presenter Program that introduces Members to a variety of investment opportunities from top finance experts as well as presentations encompassing social and family issues outside the world of finance.

*"Through our meetings, we continually challenge our conventional assumptions, our investment choices and our strategic view of the financial world. Members know they are getting honest and credible advice on wealth preservation from their peers, something they typically do not receive from even the most trusted financial advisors."*

-Michael Sonnenfeldt  
Founder of TIGER 21

In an atmosphere of complete confidentiality, TIGER 21 Members share knowledge and experiences beyond their portfolios. While tax strategies, economic trends, and investment ideas are vetted at monthly meetings, discussions on managing children's expectations and inheritances or the intersections of wealth, isolation and leadership also surface. TIGER 21 is not for everyone. Members must be willing to invest one full day a month and be open and honest in their groups. The benefits accrue over months and years through unbiased, knowledgeable, insightful advice from peers who share similar concerns.

## A DAY AT TIGER 21: PROGRAM

TIGER 21's small group meetings are confidential and lead to an exchange of information on investments, strategies and trends. Each monthly, day-long meeting features:

- **The World Update:** An open forum where investment ideas are offered, analyzed and evaluated.
- **Issues and Opportunities:** A wide ranging discussion from world events to economic news to personal issues that might affect Members' outlooks and investment decisions.
- **World-Class Experts:** Invited guests speak on a limitless range of topics from alternative investments, private equity, asset allocation, to trust and estates, philanthropy and trends in national security and international relations.
- **Portfolio Defense:** A confidential disclosure and rational defense of an individual Member's investment portfolio, followed by candid feedback from the group. The Portfolio Defense is the main differentiator from other peer-to-peer learning groups and is often a determining factor when someone is contemplating membership at TIGER 21.

*"When you sell a company and leave it behind, you leave your identity behind, too. After I sold my business I realized that I was too young to retire. I wanted to surround myself with other successful people and continue to learn."*  
– TIGER 21 Member

## THE BEST & THE BRIGHTEST: HEADLINER SERIES

The TIGER 21 Headliner Series is a premier speaking venue that attracts some of the world's most prominent thought leaders. In an intimate setting, Members hear from notable presenters such as Carl Icahn, legendary corporate raider turned shareholder activist; George Mitchell, former United States Senate Majority Leader; Larry Kudlow, media personality and host of CNBC's "Kudlow & Co."; and Mohamed El-Erian, leading investment strategist and Chief Executive Officer of PIMCO. Through archived videos, we are able to bring our world class speakers to all Members, regardless of location through our Member Website.

## ONLINE LEARNING COMMUNITY: TIGER 21 WEBSITE

The Member website, [www.tiger21.com](http://www.tiger21.com), connects the entire network and allows Members quick and confidential access to one another's point of view and financial ideas. Through its private Members-only forum, Members can quickly send out an investment question or topical concern and they will often receive a full range of responses and suggestions.

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