THE ULTIMATE PLAN B GUIDE

Your Blueprint For Ensuring You Thrive... No Matter What Happens In The World
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WHAT EXACTLY IS A PLAN B?

If you live, work, bank, invest, own a business or hold all your assets in the same country as the one you're a citizen of, then you are putting all of your eggs in one basket.

You're making a high-stakes bet that everything in that one single country is going to be OK, no matter what happens in the world…

And as the last 18 months have illustrated, things can go wrong very badly, and very suddenly. Countless people in places like Australia, Chile and the UK, who assumed that “everything will always be okay”, learnt the hard way that this simply isn’t true.

And if you, like us, don’t like playing Russian Roulette if you don’t need to, then a robust Plan B becomes a non-negotiable.

The year 2020 poignantly illustrated just how fast life can go from normal to 10 on the crazy scale — literally overnight.

It’s not outside the realm of reasonable possibility that the global economy could tank (again). A natural disaster could hit, the political system could go into turmoil, or an erroneous keystroke error might happen in some random office at the IRS.

And that’s all it could take for you to lose everything — your money, your assets, and possibly, even your freedom.

Fortunately, there are a number of simple, logical steps you can employ to protect yourself, your family and your assets from such risks.

We call this building a Plan B, and you can think of it as your customized insurance policy.

*And a Plan B is an insurance policy you need.*

We insure what we can’t afford to lose: Our health, our property, our savings are things we insure against potential risks such as hitting another car or person when we drive, or a neighborhood kid falling in our pool, or a disgruntled customer taking us to court over a dispute.

Some people insure even more than this — their jobs, their lives, and their kids.
But there are some things you can't buy insurance policies for: Taxation, inflation, default of Social Security Administration, banking collapses, capital controls, and loss of freedom all are worth protecting against, but don’t have traditional “insurance” products.

Your insurance against these risks is a robust Plan B.

And the goal of your Plan B is not only to insure yourself against such predictable scenarios, but to protect yourself so that no matter what happens next in the financial or political worlds, you will be OK... and not just survive, but thrive.

WHAT MAKES FOR A GOOD PLAN B?

1. It Makes Sense Regardless of What Happens (or Doesn’t Happen) Next

The hallmark of a great Plan B is that the steps you take make sense no matter what happens (or doesn’t happen). It makes sense no matter who is in office. It makes sense regardless of whether a litigious neighbor moves in next door. It makes sense regardless of what happens to your job or business.

For example, you’ll never be worse off for holding some physical cash. Having some cash on hand makes sense in any scenario, even if you never need it. The same goes for being able to grow your own vegetables, or having a freshwater well near your home.

Likewise, you want to make sure your other Plan B steps make sense no matter what. They’ll help you if you need them, and will either help (or at least won’t hurt you) if you don’t…

But in 2021, with looming wealth, income and even death taxes, for most people who’ve achieved any amount of success, the reality is that Plan B is now becoming Plan A.

2. A Plan B Mitigates Your Downside Risks

Protecting what you already have — your earning potential, your savings, your home — is an essential part of any robust Plan B. Making money is typically the first challenge... and then keeping it is the second.

Asset protection, fundamentally, is about safeguarding what you already have, that which you’ll
earn and achieve later on in life, and especially that which you’ll be leaving to your loved ones when you’re gone.

This aspect of your Plan B involves risk prevention and mitigation, but also requires protecting and enhancing your freedom.

Personal liberty is a concept that most people took for granted. The freedom to attend religious gatherings. The freedom to see your friends and family. The freedom to travel internationally.

And out of the blue, with the arrival of COVID-1984, those freedoms were decimated. Sovereign Man has been advocating the merits of having a second residency and/or citizenship for well over a decade. But for many people, the risks just didn't seem clear and present enough to take decisive action.

Given what we know today... Can you think of any reason you would have chosen to delay applying for second residency or citizenship if you had the chance previously?

3. A Plan B Sets You up to Take Advantage of Emerging Opportunities

Once you’ve effectively mitigated your risks and safeguarded your freedom, the next pivotal aspect of your Plan B is to effectively position yourself for gain. It means increasing your prosperity, opening up more opportunities, and growing your wealth.

Two of the most effective ways of achieving this, without any downside, so you’ll be fine no matter what happens next, involves legally reducing your tax burden, and diversifying your investments.

HOW TO MITIGATE YOUR DOWNSIDE RISKS

No one likes to pay for health insurance.

If you don’t smoke, if you go to the gym regularly, and if you generally eat well, it just might not seem worth it.

Especially when the average cost of insuring against just catastrophic health incidents can take up a significant percentage of your income.
But you do it anyway, because paying small amounts over time is still better than having to write a huge check when you're at your worst.

The same goes for fire insurance on your home. It sure hurts to pay for it each year, but it's still better than spending hundreds of thousands on a new house if the old one catches fire.

These insurances are common. Everyone has them.

However, there’s one huge threat to our livelihoods that very few insure themselves against: financial disaster.

In comparison to your house suddenly bursting into flames, financial panic is far more predictable and frequent. This is a likely threat that should not be ignored.

For example, given that historically speaking, the average financial cycle lasts about 6 years or so, most people will see a dozen recessions over the course of their lifetime.

So while we might not know the exact day or month that a recession or other financial crisis will hit, we know it’s coming.

And unlike a heart attack, financial crises don’t just appear out of nowhere. They can be diagnosed and mitigated ahead of time.

Knowing this, it makes sense to take steps before a crisis hits to protect yourself against such highly probable risks.
1. LOSS OF FREEDOM:

COVID-19 has led to unprecedented curtailment of travel freedoms around the world. But beyond mobility challenges, overreaching governments are now also dictating where you can go, who you can see, when you can see them, whether you can work and support your family, and even what you need to put inside your body.

And to top it all off, freedom of speech is being eroded by a rabid army of woke-ists policing every aspect of life, both on and offline, for wrongthink transgressions.

2. RISING TAXES:

In 2019, an average American spent 4.5 months of the year working... just to pay their taxes (federal and state income tax, payroll, sales, property and other taxes) — assuming that every dollar earned during this time goes to a tax man.

It’s even worse for many people in Europe, where income taxes alone can amount to more than half of one’s income.

And now, with government debt at record high levels across the Western world, governments will lean on taxation even more heavily to stay afloat.
3. **INFLATION:**
For a government deep in debt, there’s nothing more tempting than printing money to pay the bills — as we’ve seen occurring all around the world during the COVID-19 pandemic.

The more indebted they become, the faster they print, destroying the currency and eating away at the value of people’s savings. This threat to your income and savings is not only highly probable... it’s already happening.

4. **SOCIAL SECURITY DEFAULT:**
By the US government’s own estimates, Social Security will be insolvent in less than 20 years. They may be able to buy some more time by pushing back the retirement age, but eventually significant benefit cuts will become inevitable.

5. **FRIVOLOUS LITIGATION:**
Modern day America is one of the most litigious societies in the history of the world. If you’re involved in providing services, or run your own business for a living — and especially if you’ve attained any level of success in doing so — the risks of getting sued by opportunistic creditors and their equally opportunistic lawyers is real.

6. **STOCK MARKET CORRECTION:**
As of the end of 2021, stock market valuations in the Western world are at ludicrous all-time highs. While we aren’t crystal ball equipped market prognosticators, the probability of a significant market correction grows with every passing day.

7. **SOCIAL UNREST, NATURAL DISASTERS AND PANDEMICS:**
Between COVID pandemics, social unrest in various countries, heat domes, runaway megafires, disrupted supply chains and global warming, the scope for black swan events is increasing dramatically.
THE SOLUTIONS TO COUNTER THESE THREATS

Though this is by no means an exhaustive list of tools, it demonstrates that for every threat to your livelihood and wellbeing, there are multiple, easy-to-implement solutions. (We explain all of these in detail regularly to our subscribers.)

1. LOSS OF FREEDOM
   Solutions include: Second Residency, Second Citizenship, Moving out of bigger cities, Physical Cash, etc.

2. RISING TAXES
   Foreign Earned Income Exclusion, Maximizing the use of retirement accounts (including Self-Directed structures), and Captive Insurance.
   Moving to Puerto Rico (for US citizens), and obtaining TAX residency where taxes are low or non-existent (for non-US nationals).

3. INFLATION
   Physical Precious Metals, Currency Diversification, Real Assets, Investing in Productive Businesses, etc.

4. SOCIAL SECURITY DEFAULT
   Retirement Accounts (including Self-Directed), Offshore Real Assets, Value Investing etc.
FOUR PROVEN STRATEGIES TO REDUCE YOUR POTENTIAL RISKS

As this guide is meant as an introduction to this topic, we won’t go into the great detail on every potential strategy, but we do want to highlight a few important ones.

1. KEEP A PORTION OF YOUR SAVINGS IN PHYSICAL CASH

This is one of the most critical strategies for your Plan B — and also one of the easiest to implement.

If something happens in the banking system, and all of your money is trapped in the bank (or on some digital ledger), your savings effectively become worthless.

The Greeks learned this lesson the hard way during the 2015 financial crisis, when the Greek government limited daily cash withdrawals from bank accounts to 50 euros a day.

At the same time, with inflation in the USA currently being at its highest level in 30 years, it wouldn’t make sense to keep all of your savings hidden in your mattress… they will lose some of their value each year.
But to ensure you are protected in case of a catastrophic event in the economy, withdraw and store at least two months’ of expenses in physical cash as a crucial hedge against emergency situations. (This amount may vary quite widely from one person to the next, depending on their risk tolerance and amount of available savings, etc.)

There is almost no cost to doing this, and it is a complete no-brainer given the state most western banking systems are in.

2. PURCHASE PRECIOUS METALS

While physical cash is a great hedge against short-term problems in the banking system, keeping precious metals is also a long-term hedge against more serious, systemic challenges in the monetary system.

If governments continue printing money to the point of serious inflation (as witnessed in Venezuela, Zimbabwe and the Weimar Republic), you will own a real asset that will protect your purchasing power.

You should also consider storing your precious metals offshore to protect yourself from confiscation, frivolous litigation and social unrest.

3. TRY TO OBTAIN A VALUABLE SECOND PASSPORT THROUGH ANCESTRY

The ultimate insurance policy that you can have is a second passport (or, if that's not possible, a second residency, which we’ll discuss below).

It all comes down to the fact that having more than one option means you aren't beholden to a single government.

And even if you don't make use of a second passport right now, you will have an escape plan ready.

That way, when things go south, you can go north. You can immediately, legally and effectively take yourself and your family out of harm's way.

Of course, a second passport also confers many other benefits: It can protect you from travel and “people controls”, open up more internationalization options, give you more visa-free travel options, and potentially even reduce your tax obligations.
(During the height of the pandemic, almost all countries in the world banned tourists from entering their territories, but still allowed citizens and legal residents in.)

Usually, obtaining a second passport requires either a lot of time or a lot of money.

But if you’ve had the good fortune to have parents, grandparents, or in some cases, even great-grandparents from the right places in the world, a second citizenship can generally be easily and inexpensively obtained.

If you have ancestors, for example, from Italy, Poland, Ireland, Hungary, Lithuania or Latvia, you might be entitled to citizenship based on your ancestry.

This means you can get a second passport in a short time, and at very low cost.

Members of our Sovereign Confidential service have access to intelligence reports showing, step-by-step, how to take advantage of these ancestry-based second passport programs.

If you are not in the “lucky bloodline” club, but have enough funds, then you can also consider obtaining Citizenship By Investment. You can read more about this option here.)

4. OBTAIN A SECOND RESIDENCY

If you are not eligible for a second passport through ancestry, the next best option is to obtain a second residency.

It gives you the same benefit of always having a place to go, and it can even potentially lead to a second passport within a few years through naturalization.

One of the easiest places to obtain residency used to be Panama, but their Friendly Nations Visa, which was one of the best “paper residencies” we’ve ever seen, has recently become far more restrictive (and expensive).

But if you missed out on the earlier version of the Friendly Nations Visa, don’t despair: Mexico is still an excellent second residency option; as is Portugal, via its D7 Visa Program.

And if you’re looking to obtain a flexible second residency in a hurry, there are also numerous Golden Visa Programs to investigate.
HOW TO POSITION YOURSELF FOR GAIN

The secondary phase of your Plan B is all about positioning yourself for gain, creating more prosperity and growing your wealth.

In this guide, we are going to focus on the two most important ones — tax reduction, and investments outside of the mainstream.

Three Strategies to Legally Reduce Your Tax Obligation

Legally reducing what you owe in taxes may lead to the greatest return on investment you can get.

Imagine being able to add an additional 30% per year to your pocket, just because you have opted to implement a few completely legal, totally legitimate, easy, no-brainer tax strategies.

But before we continue, please let me stress that you should never try to avoid paying what you owe. It is just not worth it, considering the penalties, and knowing how many simple, legitimate tax strategies are available to you.

Disclaimer: We are NOT tax advisors, and you should treat the above information as general information only. Always make sure to discuss your specific situation with a trusted tax advisor before setting up any tax structures or implementing any of the relevant strategies discussed in this report.

1. Move abroad and earn north of $200,000 per year, tax-free

As an American living abroad, you can take advantage of the Foreign Earned Income Exclusion, which, in 2021, allows you to earn up to $108,700 in income tax-free. Together with your spouse, you can earn north of $200,000 completely free of federal income tax. (Depending on your activity, there may still be self-employment tax to pay.)

Won’t you have to pay taxes to a new country instead?

If you move abroad to a country with no taxation at all, such as the UAE, then there will be no local taxation to worry about.

Similarly, if you move to a country with a territorial tax system, with proper planning, it’s entirely possible to pay no taxes to your new homeland too. Examples in the latter category include Panama, Costa Rica, Nicaragua and Malaysia.
And citizens of countries other than the US can entirely disconnect from their home tax systems by moving abroad, and thus pay tax to no one at all, no matter how large their income will be.

2. Slash your tax bill to 4% by taking advantage of Puerto Rico’s incentives

Over the past few years, the government of Puerto Rico, desperate to jumpstart its economy, enacted a number of excellent tax incentives to attract new residents.

Among these are the Act 60 Tax Incentives (which includes the former Act 20 and Act 22). They provide for a corporate tax rate of just 4% (plus a small municipal tax) for companies exporting services outside of Puerto Rico, as well as a full exemption for individuals, on taxes on selected types of investment income, including capital gains on stocks, and crypto.

Since Puerto Rico is a self-governing US territory, if you become a bona-fide resident there, you will NOT be required to pay US federal taxes on income you earn in Puerto Rico.

This means you can set up a Puerto Rican company that provides services to customers worldwide (they can’t be located in Puerto Rico), and you’ll pay only 4% while accumulating or reinvesting the rest.

Similarly, with Act 60, you can entirely slash capital gains taxation of your stocks and crypto holdings.

You can learn more about this strategy in this article and download our free guide to Puerto Rico.

3. Open a Self-Directed IRA to maximize growth and invest in a broader range of assets.

Most conventional IRAs limit the scope of assets you can invest in; essentially you’re looking at mutual funds, stocks and bonds only. Converting your IRA to a Self-Directed IRA gives you the ability to invest in a broader range of assets with higher growth potential.

While Self-Directed IRAs are typically more complex to manage, and do carry a greater potential risk of causing a run-in with the IRS, they do enable you to invest in assets like rental real estate (both domestic and foreign), foreign currencies, precious metals, cryptocurrency and private equities.

(Keep in mind that you need to be aware of “prohibited transactions” when dealing with Self-Directed IRAs. For example, you cannot personally live in or benefit from any property your IRA holds. When in doubt, consult with a professional.)
A Self-Directed IRA also gives you far greater control of your retirement savings, making you less beholden to what happens on the stock markets.

If you’re interested in learning how you can convert your existing IRA into a Self-Directed IRA and take back control of your retirement planning, be sure to read our free in-depth article on the topic here.

**GROW YOUR WEALTH BY INVESTING OUTSIDE THE MAINSTREAM**

When it comes to investing, one should always look for smart investments that have high risk-adjusted returns.

Imagine, for example, that someone offered you an investment deal that was fraught with risk, and you had a 99% chance of losing your money. In the small chance that it worked out, your expected investment return would be 15%.

Then someone else offered you another investment deal that had an extremely low chance of loss. Your money would be fully backed by multiple assets, audited, and guaranteed by creditworthy institutions who put collateral on the line.

This second investment, however, only carried a return of 9%.

Which would you choose?

Clearly 15% is higher. But the 9% return carries so much less risk; it seems like the only sensible approach.

That’s what we call a ‘risk-adjusted return’. And Investment B’s risk-adjusted return is dramatically higher than Investment A’s.

In conventional finance, you’ll often find risk defined as a function of volatility.

This is an absurd way to measure risk.

Risk really has nothing to do with volatility. In fact, when prices of assets swing wildly one way or another, those are merely opportunities to buy or sell.
To us, the real definition of risk is the likelihood of a permanent loss of capital.

And the best way to mitigate that is to buy:

(1) High-quality assets,

(2) Managed by competent people of integrity,

(3) At prices that are at/below intrinsic value.

This has become extremely difficult in today’s markets. There are a lot of high-quality assets out there — great, profitable companies, or beautiful pieces of real estate. But their prices are astronomical. Companies’ stocks are selling for huge multiples of their earnings and net asset values. And finding great bargains has become much more difficult, at least among conventional options in finance.

Outside of the conventional options is a whole world of opportunities in agricultural real estate, private equity, and much more.

But in this guide, we want to focus on one option that we encourage you to consider.

Deep Value Investments

_Disclaimer:_ We are NOT investment advisors, and none of the information in this report should be understood as constituting investment advice. Always be sure to discuss any prospective investments with a trusted financial advisor before making any investment decisions.

(Note: In recent times, many deep value investments have experienced somewhat of a slump, both in terms of expected returns on investment, and the time scales required to achieve it.)

We’ve not made a secret of the fact that we’re no fans of the stock market.

With such heavy manipulation from central banks and large investment banks, it’s clear that the system is strongly rigged against the little guy.

There are just too many factors that one can’t control in the stock market.
Even worse, with stocks in many markets trading near all-time highs, it’s really hard to find any compelling opportunities.

What we do know is this: Market bubbles end… and they end especially badly for investors who entered markets near the top. And when they do, it can potentially take decades to recover losses.

Japan’s stock market is a prime example…

In December 1989, Japanese investors were in a frenzy. The country’s Nikkei Index — comprising the top 225 Japanese companies by market cap — soared to an all-time high of 38,957. But then, fearing rising debt levels and coming inflation, Japan’s central bank hiked interest rates.

Less than one year after the blow-off top, the market’s value was cut in half. Over the past few decades, Japanese policymakers attempted to reinflate stock prices. But it wasn’t until mid-February 2021 that the Nikkei Index finally hit a milestone: back above 30,000.

This is still 25% below the all-time high.

The lesson: If you had invested in the Nikkei Index in 1989 at the market top, over 30 years later you would still hold a losing trade.

The US stock market is not immune to this same pattern.

*We’re not investment professionals, so we’re not here to offer advice. And we’re also not market prognosticators. But we can point to the facts and urge you to think about the risks in this market.*

Like we said at the beginning, it’s very hard to make money when buying anything at its all-time highs.

However, when you start buying at multi-year lows, your long-term rate of return improves dramatically.

There are corners of the market where you can find some fantastic, deep-value opportunities.

So, even though we’re averse to the stock market in principle, on the rare occasions when, as the investor and the friend of *Sovereign Man*, Jim Rogers says, there’s money just sitting there in the corner, we’re happy to take that deal.
This is the strategy that Warren Buffett has used to become one of the most successful investors of all time. We have a great article called *50 years of data prove value investing to be the most profitable investment strategy*, which we encourage you to check out.

In this strategy, you purchase stocks that trade for less than their intrinsic value… meaning the entire market cap of the company is lower than the value of the tangible and intangible assets of the company.

We personally like to focus on tangibles only, as the intangible value of a company can be hard to measure accurately.

And sometimes you can even find companies that trade for less than the cash they have in the bank.

For example, a company might have $20 million sitting in a bank account, and have zero debt, but due to the market’s irrationality, the company’s total market capitalization may be just $17 million, at a 15% discount to its cash backing.

And it happens more often than one may think.

So this means that there are several different ways you can profit from this strategy...

**Capital Appreciation**

By purchasing a well-managed, growing company that trades for less than its intrinsic value or even cash balance, there’s a very strong chance that you’re buying near the bottom, which reduces your risk significantly.

Consequently, you can expect the share price to increase dramatically, even if it returns just to its intrinsic value.

**Currency Appreciation**

The second way you can make money with this strategy is with currency appreciation.

You can buy companies in foreign currencies, like the Australian dollar, at the time when they are weak.

In March of 2020, during the worldwide panic caused by the pandemic, the Australian dollar (AUD) was totally hammered against the US dollar. For one USD you could get 1.7 AUD at that time.
Since then, the panic subdued, and the AUD recovered significantly.

If you invested in an Australian listed company in March of 2020, you would easily make 20% just on currency appreciation.

This substantially reduces the downside risk.

And if these currencies do nothing more than return to their historic average, then you will also make money on the currency appreciation.

This is an exceptional investment strategy: you’re taking on limited risk while exposing yourself to multiple, significant upside opportunities.

We also have an investment newsletter called *The 4th Pillar*, which focuses primarily on purchasing companies that are trading for less than cash.

**CONCLUSION**

Unlike your typical insurance policy, most strategies in a Plan B can provide tremendous benefit to you, **whether or not a crisis ever strikes**.

By opening you up to new opportunities and enabling you to save a fortune on your taxes, they more than cover the cost of the ‘premium’.

By moving abroad, not only can you instantly benefit from dramatically reducing your tax burden, but you can also put yourself on the path to a second passport.

This is the ultimate insurance you can have against an oppressive government, *and* it can also expand your world of opportunities in terms of where you can live, work, and do business.

**And with benefits like these, you might soon find that your Plan B...has become your Plan A.**

As an additional bonus you can find a Plan B Checklist on the next page.

With it you’ll be able to check off the strategies you’ve already implemented, as well as see what solutions you have yet to take advantage of.
YOUR BONUS PLAN B CHECKLIST

MITIGATE YOUR DOWNSIDE RISKS

☐ PHYSICAL CASH & PRECIOUS METALS
Hold two months’ worth of expenses in cash, AND two months’ expenses in precious metals.

☐ OFFSHORE GOLD STORAGE
Keep your gold and silver protected in a safe and solvent jurisdiction overseas where your home government can’t touch it.

☐ FOREIGN RESIDENCY
So that you always have a place to go — if you need to — and you can take advantage of living and doing business overseas.

☐ PRIVACY & SECURITY
With so much of our lives and assets in digital form, make sure you protect your digital life from unauthorized access and abuse.

☐ PERSONAL RESILIENCE
Take some basic steps to ensure your water, food and energy security.

☐ SECOND PASSPORT
Prevent any one government from having total control over your freedom to travel — the best insurance policy there is.

☐ INSURANCE
Life, health, home, auto, disability, etc. You may never need it, but it pays to have some protection just in case.

☐ ESTATE PLANNING / OFFSHORE TRUST
Ensure that you protect and stay in control of what happens to your assets after you pass away.

☐ CRYPTOCURRENCY
The world is quickly moving away from centralized currencies, giving cryptocurrency a major role in a well-diversified basket of savings in the future.

☐ COMPLIANCE
Follow the law, fill out the proper forms, and keep out of hot water.

TAKE ADVANTAGE OF EMERGING OPPORTUNITIES

☐ FINANCIAL EDUCATION
Become financially sophisticated so that you can take advantage of the numerous investment opportunities worldwide.

☐ INTERNATIONAL BROKERAGE ACCOUNT
Expand your investment opportunities and consider holding your investment capital in safer brokerages overseas.

☐ GLOBAL INVESTMENTS*
Consider investing in public companies worldwide that offer a superior risk/reward ratio to overvalued Western markets.

☐ SAFE VALUE INVESTMENTS*
Consider using the strategy that made Warren Buffett one of the richest men alive by investing in capital preservation and steady growth without taking huge risks.

☐ PRIVATE EQUITY INVESTMENTS*
Consider allocating a portion of your capital to investments in private companies that can yield you multiples of what you put in, or could even go to the moon.

☐ OVERSEAS REAL ESTATE*
Consider trading your overvalued dollars for a beautiful tangible asset in a thriving location overseas.

☐ SELF-DIRECTED IRAs
Take control of your retirement funds and invest them much more profitably by eschewing the plain vanilla options of stocks, bonds and mutual funds.

☐ TAX PLANNING*
Consider employing various strategies to legally minimize, defer, or even eliminate what you owe in taxes. Also consider robust asset protection and estate planning strategies that can help you create and preserve intergenerational wealth.
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We are not investment or tax advisors, or IT professionals, and this should not be considered advice. It is very important to do your own analysis before making any investment or employing any tax or IT strategy. You should consider your own personal circumstances and speak with professional advisors before making any investment.

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