

# **Professional Investing for Everyone - Including Crypto**

## **Why This Guide Matters**

Investing is no longer just about stocks and bonds. Digital assets like Bitcoin and Ethereum have entered the mainstream, and smart investors need to understand how they fit into a long-term plan.

## **Who This Guide Is For**

Professionals, business owners, and long-term savers who want a modern, well-informed approach to investing - including exposure to crypto - without gambling or guesswork.

## **How Much Crypto Is Right?**

For many investors, a 1-10% crypto allocation can diversify and hedge against inflation, but it should fit your goals, risk profile, and timeline.

## **How to Hold Crypto Safely**

Use regulated custodians for large balances. Learn the pros and cons of hardware wallets, hot wallets, and third-party platforms.

## **Tax and Estate Planning Considerations**

Crypto has unique tax rules. Plan for capital gains, inheritance, and digital asset transfer in your estate plan.

## **Working with an Advisor**

A licensed fiduciary who understands both traditional and digital assets can help you build a cohesive, forward-thinking strategy.