



# Personal Alternative Investment Strategy

Build your personalized approach to alternative investments based on your situation, goals, and risk tolerance.

## Section 1: Self-Assessment

Investment Time Horizon:

Select...



Risk Tolerance:

Select...



Current Portfolio Value (approximate):

Select...



Primary Goal for Adding Alternatives:

☐ Diversification

☐ Inflation protection

☐ Higher returns

☐ Income generation

☐ Reduce volatility

☐ Crisis hedge

## Section 2: Target Alternative Allocation

Alternative Asset	Include?	Target %	Rationale
REITs (Real Estate)	<input type="checkbox"/>	<input type="text" value="5"/>	<input type="text" value="Why include?"/>
Gold/Precious Metals	<input type="checkbox"/>	<input type="text" value="5"/>	<input type="text" value="Why include?"/>
Commodities	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="Why include?"/>
Cryptocurrency	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="Why include?"/>

Alternative Asset	Include?	Target %	Rationale
Other:	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="Specify..."/>
<b>Total Alternatives</b>		<b>10%</b>	<b>(Recommended: 5-20% of portfolio)</b>

### Section 3: Management Rules

Maximum allocation to ANY single alternative:

→  ▼

Rebalance alternatives when they drift by:

→  ▼

Review alternative holdings:

→  ▼

If an alternative drops 30%+, I will:

→  ▼

**Additional personal rules:**

e.g., Never invest in alternatives I don't understand, always use index funds for alternatives...

### Section 4: Review and Monitoring

I will monitor my alternative investments by:

- ☐ Tracking performance vs. stated objectives
- ☐ Reviewing fees annually
- ☐ Checking correlation benefits are still present
- ☐ Reassessing when my situation changes

☐ Comparing to simple alternatives (index funds)

**Next review date:**

mm/dd/yyyy



## Section 5: Strategy Summary

**In one paragraph, summarize your alternative investment strategy:**

Describe what alternatives you'll include, why, and how you'll manage them...