



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:

- | | |
|--|---|
| <input type="checkbox"/> Diversification | <input type="checkbox"/> Inflation protection |
| <input type="checkbox"/> Higher returns | <input type="checkbox"/> Income generation |
| <input type="checkbox"/> Reduce volatility | <input type="checkbox"/> Crisis hedge |

Section 2: Target Alternative Allocation

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

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

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...