

Questions to ask before investing in private markets

Thinking about taking the next step? This checklist will help you consider whether the opportunity in private markets fits your goals, comfort level and curiosity for something beyond the traditional.



It's important to ask this...



So I understand that ...

Does this investment align with my financial plans?

The anticipated outcome supports the vision for my long-term financial objectives and legacy plans.

Am I comfortable thinking longer term?

Private investments often take years to mature. I understand there may not be an easy way to quickly sell or exchange, even if circumstances change.

Am I excited by being close to innovation and entrepreneurship?

Investing privately can connect me with emerging companies and new ideas.

Can I handle less frequent pricing or reporting?

I'm okay not seeing daily values or market updates like I do with public investments.

Am I prepared for capital calls or distributions over time?

My money will be invested or returned on a different schedule than traditional public investments typically employ.



It's important to ask this...



So I understand that ...

Am I motivated by the potential for higher returns while comfortable with added risk?

While private markets frequently reward informed risk taking and patience with new sources of growth and income potential, investing comes with unique considerations, including operational and liquidity risks.

Am I willing to pay potentially higher investment fees?

Private investments may involve higher management fees and I have evaluated with my advisor whether the potential benefits justify these costs.

Have I considered potential tax implications?

While select private market investments may enhance tax optimization, they also may create additional tax-reporting or require specialized forms and I'm prepared to discuss with my tax advisor.

Do I understand the steps involved?

I'm comfortable providing financial documentation and staying on top of subscription funding and reporting requirements that may come along with private investments.

Private markets may be a good fit if you have:

- ☒ Long investment horizon (10+ years)
- ☒ Adequate liquid reserves (6-12 months expenses plus capital call reserves)
- ☒ Tolerance for potential illiquidity and volatility
- ☒ Accredited investor status (required for select private investments)
- ☒ Professional advisory support

For more information, please consult with your financial advisor.

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