



CG
Advisor
Network

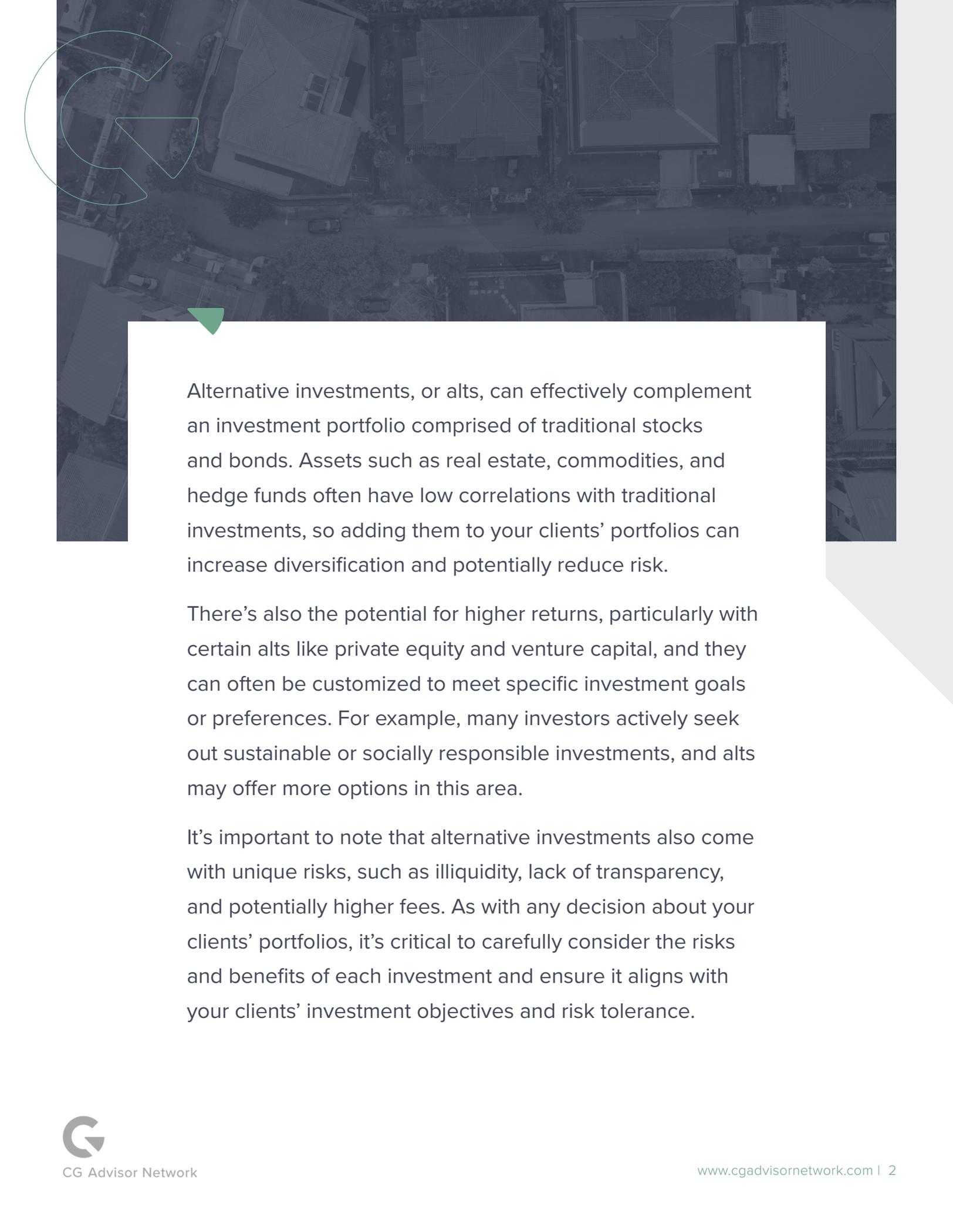
Beyond Stocks and Bonds: A Guide to Alternative Investments

Help your clients find new opportunities with greater portfolio diversification.

For independent advisors looking to support their clients in an often unpredictable market, alternative investments can effectively mitigate risk and boost potential returns. Through proper planning and execution, the inclusion of alternative investment opportunities in client portfolios as part of a comprehensive asset allocation strategy offers an opportunity for greater portfolio diversification.

CG Advisor Network empowers independent firms with valuable investment management solutions that extend beyond traditional stocks and bonds.

▼ www.cgadvisornetwork.com

An aerial photograph of a city, showing buildings, streets, and greenery. A large green arrow points from the top left towards a white rectangular text box in the center of the image.

Alternative investments, or alts, can effectively complement an investment portfolio comprised of traditional stocks and bonds. Assets such as real estate, commodities, and hedge funds often have low correlations with traditional investments, so adding them to your clients' portfolios can increase diversification and potentially reduce risk.

There's also the potential for higher returns, particularly with certain alts like private equity and venture capital, and they can often be customized to meet specific investment goals or preferences. For example, many investors actively seek out sustainable or socially responsible investments, and alts may offer more options in this area.

It's important to note that alternative investments also come with unique risks, such as illiquidity, lack of transparency, and potentially higher fees. As with any decision about your clients' portfolios, it's critical to carefully consider the risks and benefits of each investment and ensure it aligns with your clients' investment objectives and risk tolerance.

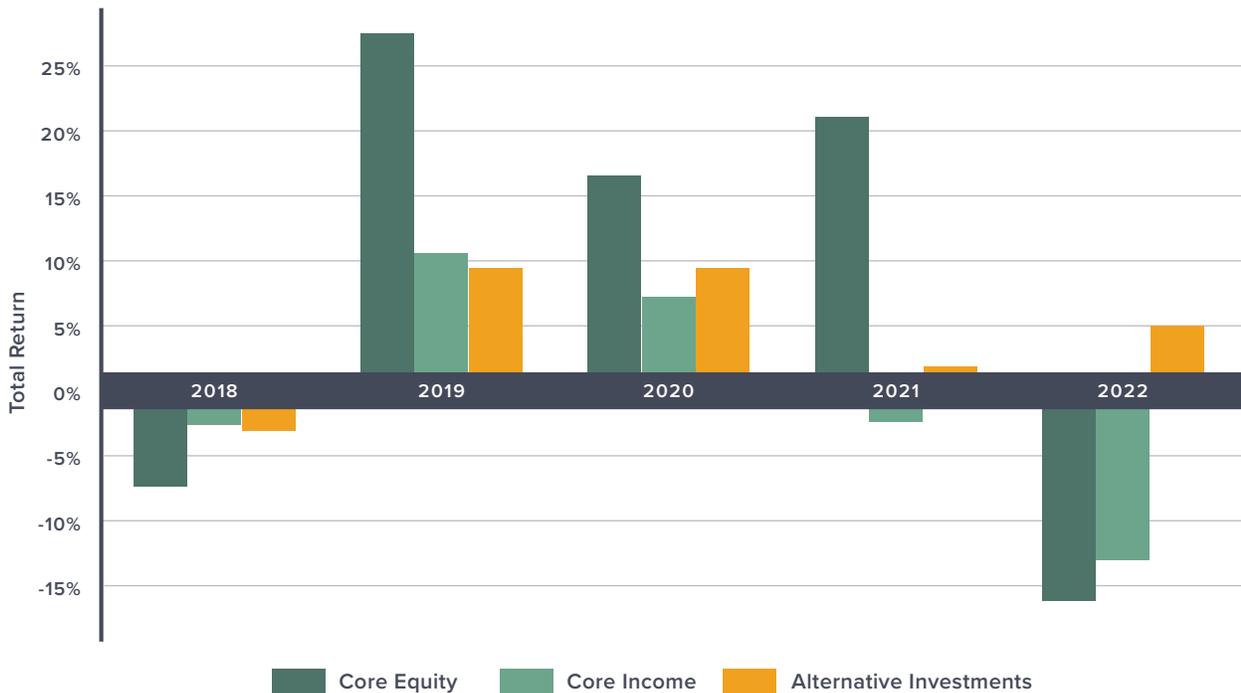


Our Approach to Alternative Investments

Not all alts are created equal, so selecting the correct strategies and managers is paramount. CG Advisor Network specifically targets strategies that have a true causal reason to perform differently from our core stock and bond allocations, making them a valuable complement to the traditional portion of a client's portfolio.

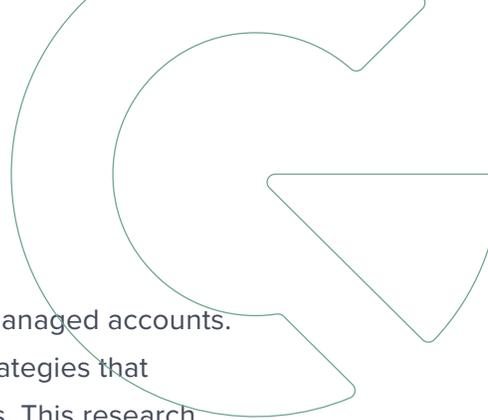
We know how important the power of diversification is, and by adding alts to a portfolio, we see more stability and less vulnerability to market swings. In 2022, for example, when stocks performed particularly poorly, we saw a completely different movement from alts, working as they do mainly independently from traditional markets.

COMPARISON OF CORE STOCK AND CORE BOND ALLOCATION PERFORMANCE WITH ALTS ALLOCATION PERFORMANCE





Our approach is to use variations of these strategies within our managed accounts. We undertake extensive research to choose the right types of strategies that perfectly complement our Core Equity and Core Income positions. This research often includes rigorous data analysis, testing, and 1-on-1 calls with the managers of each alt strategy. The end goal is to create great outcomes for our clients with higher risk-adjusted returns.



Find Out How We Can Support You as an Independent Advisor

Get in touch with our team to learn more about the CG Advisor Network.

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