

The facts about real estate and private market investments

How well do you know real estate and private markets? The facts about these increasingly popular investment strategies may surprise you.

1 **MYTH**
“It’s too risky.”

FACT

- ✓ Adding real estate and private markets to your portfolio **may be less risky than stocks and bonds alone**, given broader diversification.

2 **MYTH**
“Only the ultra-wealthy can access alternatives”

FACT

- ✓ In some cases, you can now access strategies once reserved for the ultra-wealthy with **minimum investments starting at just \$2,500**.

3 **MYTH**
“Investments aren’t transparent.”

FACT

- ✓ Many managers provide similar transparency as stock and bond funds, including **periodic updates on portfolio holdings and performance**.

4 **MYTH**
“It costs too much to invest.”

FACT

- ✓ Alternatives fees can be higher due to active management, operational complexity, and the illiquidity premium they offer, but it’s important to **consider them in the context of net returns**.

Investment opportunities beyond stocks and bonds



Real estate

Properties with potential to distribute rental income and appreciate in value



Infrastructure

Essential, income-generating assets like utilities and data centers



Private equity

Ownership stake in privately held companies with strong growth prospects



Private credit

Privately issued loans that can be secured by companies or hard assets

Ready to take action?

Talk to your financial professional. Together, you can determine which private investments might be right for your portfolio.

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