

Alternative Assets

BEGINNER

PRACTICE WORKSHEET

Grab a pen and pick one real alternative asset you're curious about (a REIT, a commodity fund, or a cryptocurrency). Research it using the 4-point checklist from the lesson, and write down what you find — there's no wrong answer, the goal is just practice.

■ Section 1 — Pick an Alternative Asset

Which alternative asset are you researching, and which category does it fall into (real estate, commodity, or crypto)?

What specifically are you buying — a fund, a physical asset, or a direct holding?

■ Section 2 — The 4-Point Checklist

What allocation size are you considering, as a % of your total portfolio?

How volatile has this asset been historically? Could you handle a large drawdown in it emotionally?

What fees, storage costs, or custody risks does it carry?

Tip: try the interactive “Diversification Blend Calculator” on the Alternative Assets lesson page at growthcapitalgroup.co to see how a given allocation could affect your overall portfolio.

■ Section 3 — Reflection

What would this asset add to your portfolio that stocks, bonds, and cash don't already provide?