Plan B Checklist

Thank you for downloading this sample Plan B Checklist. It’s important to note that this list is neither exhaustive, nor mandatory. There are many options that haven’t been included. And some may not apply to you. Always have a reason why you do something: be prudent and rational in your approach to determining which solutions to implement.

### DEFENSE

- **Physical Cash & Precious Metals:** Two months of expenses in cash AND two months of expenses in precious metals.
- **Offshore Bank Account(s):** A portion of your savings in a safe, stable, highly liquid bank account outside of your home country protected from bankrupt governments and financial crises.
- **Offshore Gold Storage:** Keep your gold and silver protected in a safe and solvent jurisdiction overseas where your home government can’t touch it.
- **Foreign Residency:** So that you always have a place to go -- if you need to -- and you can take advantage of living and doing business overseas.
- **Privacy & Security:** With so much of our lives and assets in digital form, make sure you protect your digital life from unauthorized access and abuse.
- **Personal Resilience:** Take some basic steps to ensure your water, food, and energy security.
- **Second Passport:** Prevent any one government from having total control over your freedom of travel - the best insurance policy there is.
- **Insurance:** Life, health, home, auto, disability, etc. You may never need it, but it pays to have some protection just in case.
- **Estate Planning/Offshore Trust:** Ensure that you protect and stay in control of what happens to your assets after you pass away.
- **Crypto-Currency:** The world is quickly moving away from centralized currencies. We expect crypto-currency to play a major role in a well-diversified basket of savings in the future.
- **Compliance:** Follow the law, fill out the proper forms, and keep out of hot water.

### OFFENSE

- **Financial Education:** Become financially sophisticated so that you can take advantage of the numerous investment opportunities worldwide.
- **International Brokerage Account:** Expand your investment opportunities and hold your investment capital in safer brokerages overseas.
- **Investing Globally:** Invest in public companies worldwide that offer a superior risk/reward ratio to overvalued Western markets.
- **SAFE Value Investments:** Use the strategy that Warren Buffet used to become one of the richest men alive by investing in capital preservation and steady growth without taking huge risks.
- **Private Equity Investing:** Allocate a portion of your capital to investments in private companies that can yield you multiples of what you put in, and can even go to the moon.
- **Overseas Real Estate Investments:** Trade your overvalued dollars for a beautiful tangible asset in a thriving place overseas.
- **Self-Directed IRA:** Take control of your retirement funds and invest them much more profitably by eschewing plain vanilla options of stocks, bonds, and mutual funds.
- **Tax Planning:** Employ numerous strategies to legally minimize, defer, or even eliminate what you owe in taxes.