

ROCKING WALL STREET

**Four Powerful Strategies That Will Shake
Up The Way You Invest, Build Your Wealth
and Give You Your Life Back**

GARY MARKS

GARY MARKS is founder and CEO of Sky Bell Asset Management, an asset management company with \$300 million of capital under management. He specializes in creating and managing hedge funds for qualified investors. Mr. Marks also has a successful career as a songwriter with more than ten albums of original music. Since the year 2000, Gary Marks has been living in Maui, Hawaii.

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MAIN IDEA

In devising your own personal investment strategy, it's vital that you take a holistic whole-of-life perspective rather than the more narrow money making perspective Wall Street publicizes. From this holistic point-of-view, there are four main strategies which should be used to manage both your professional life and your investment portfolio:



“Safe and successful are two words that should never be separated when considering how to invest your money. Commit to creating a portfolio that hedges risk first and foremost, and that you never again succumb to gambling your money away – even if the reward seems great. You need to know how much is enough. Don’t be constantly interested in beating the stock market every year, or having more money than your richest friend or neighbor. As soon as you grasp this key principle, you allow yourself the freedom to look beyond the End Game and find out what else life has to offer.”

– Gary Marks

Strategy #1 – Emotional Controls

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To invest successfully, you have to first get your own emotions under control so they won't work against you. To do this, you need to think about two key concepts:

1. What do you personally define as the end game of your investment activities?
2. How well do you understand the three basic concepts of hedging your investment bets?

If you can learn to hedge your emotions as well as your investments, you're well on the way.

Strategy #2 – Market Stats vs. Market Hype

Pages 4 - 5

Wall Street exists to package up market hype and present it to you as market information. Refuse to go along with the charade. When it comes time to invest, insist on doing your own thinking. Investing is always a zero-sum game. Unless you're prepared to do it 24/7 so you can spot the hype through your own due diligence, the only way to win is to refuse to play. This means that you decline to gamble and instead create a portfolio which hedges risk first and foremost.

Strategy #3 – Always, always hedge

Pages 6 - 7

Always construct an investment portfolio which is hedged. If you do nothing else, make this Rule #1. The key to building a successful personal investment portfolio is not to lose money. Have the expectation that you will earn a return of 8 to 10 percent annually with very little or ideally no volatility whatsoever and then structure your life to live off that income. You might not get on board some of the windfalls but you'll also manage to avoid the train wrecks by doing this.

Strategy #4 – Seek the end game

Pages 7 - 8

Instead of trying to buy more and better assets all the time which can end up draining all your free time, understand what your true end game is. View your investments, your career and your personal life as one indivisible whole rather than something which can be addressed when you have enough money. Gain the peace and personal freedom which successful investing can bring rather than committing to spending your entire adult life thinking about money.

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