



7 Things Clients Want Their Advisor to Know

The geopolitical landscape is changing more rapidly now than it has in decades. American investors are aware of these shifts and are looking for sound advice to help them and their families prepare for the future. Life is more complicated now than ever before and Americans need advice from someone who can help them process and understand what these changes mean for them.

The modern world seems unpredictable and scary, but many of the threats Americans face today were predicted well before they happened. The American people deserve the opportunity to prepare a financial plan that protects them and their families and ensures the values they hold dear can be preserved for their children and grandchildren to enjoy.

In this briefing we will discuss the following:

1. Inflation
2. Wokeism
3. Patriotic Investing
4. Relationship Building
5. Politics in Practice
6. Parallel Economy
7. Artificial Intelligence

WHY YOU SHOULD CARE

- » Inflation is eating away at American's savings, making it harder for families to save for major purchases, college, and retirement. They need sound financial advice now more than ever.
- » Wokeism has wormed its way into much of American culture, but most Americans want nothing to do with it, and they don't want to invest in it



7 THINGS CLIENTS WANT THEIR ADVISOR TO KNOW

- » American investments in foreign nations are likely used to produce weaponry that could target American citizens.
- » Building a strong advisor-client relationship will require discussing these topics and developing a plan that aligns with the client's values.
- » Politics have a direct impact on the market, and clients need advisors who are informed and able to plan for it.
- » A parallel economy is emerging to challenge the woke companies of today.
- » Artificial intelligence will change much of the investment landscape and clients need advisors who understand the opportunities and the threats of AI.

The 7 Things Clients Want Their Advisor to Know is brought to you by Kevin Freeman, CFA.

Kevin Freeman, CFA is considered one of the world's leading experts on the issues of Economic Warfare and Financial Terrorism. He has consulted for and briefed members of both the U.S. House and Senate, present and past CIA, DIA, FBI, SEC, Homeland Security, the Justice Department, and local and state law enforcement. His research has been presented in critical DoD studies on Economic Warfare, Iran, and Weapons of Mass Destruction presented to the Secretary of Defense and the Under Secretary of Defense, Intelligence. He has traveled extensively with research trips to Russia and China and throughout Europe and the Americas. He is also a Contributing Editor to *Tactics and Preparedness* magazine. Kevin is a NY Times bestselling author.

Kevin is a Co-Founder of the NSIC Institute; Host of Economic War Room on BlazeTV; Host of Pirate Money Radio on American Family Radio; Speaker of the Cherokee Community of North Texas; a Senior Fellow at the Center for Security Policy; former Trustee at Oklahoma Wesleyan University; and a member of the Advisory Board of First Liberty Institute.



1. Inflation

Inflation is when the money supply grows faster than the goods and services of the economy. Prices appear to go up. In reality, it's the value of the money that's going down.

“Over the last three years, we've endured price shocks that have been pretty dramatic. You don't need statistics to know that it costs a lot more to eat out, or even to eat at home, or to buy a home. Now here's the problem. Unless you understood why we were going to have such an inflation, you'd be wholly unprepared to protect against it.”

–Kevin Freeman, CFA



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If you grew up in the era of low inflation, you may not understand how quickly things go south when prices rise.

Shortly before President Biden took office, people estimated that a comfortable retirement fund would require approximately \$951,000. **In just three years, that number has jumped to around \$1.5 million.**



⚠ CAUTION: For Americans who had retirement savings plans that were designed to reach the 2020 estimates, a 50% increase to the goal in just three years likely overwhelmed the growth of their actual savings.

The average American adult has \$88,400 saved for retirement, down \$10,000 from the peak of \$98,800 in 2021 even as the perceived need has increased. Inflation has caused many people to reduce their monthly savings, while some have even turned to their savings accounts to cover expenses.

⚠ Attention: Inflation is eating away at the buying power of US families, causing many to fall behind on their retirement savings. Clients are looking for financial advisors who understand inflation and how to hedge against it.

2. Wokeism

With inflation running rampant, so has a cultural poison. Woke, a term used to describe far-left, Marxist policies, is being enforced at federal, state, and now corporate levels.

Some of these woke policies, like Diversity, Equity, and Inclusion, are modern versions of racism, determining someone's value by skin color instead of by the content of their character or merit.



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“Advisors need to understand culture. Most people are not just about making money regardless of the impact of society. If making money were the only thing, maybe we’d all sell drugs, prostitution, and pornography. There’s money to be made there for sure, but it’s dirty business and values matter to most people. And the values that people see displayed by many corporations today do not align with their own.” –Kevin Freeman, CFA



If you are devout in your beliefs, you might boycott an entertainment company that promotes things contrary to your values.

This practice should be amplified even further when it comes to investments.

To profess certain values, and then invest in a manner contrary to those values is hypocrisy. As an investor, you’re an owner, a partner.

Most Americans want to put their money where their mouth is and invest with their values, not against them. However, many Americans don’t know exactly what companies they are invested in through ETFs and Defined Contribution Plans.

Companies like BlackRock, Vanguard, State Street, etc. have been in the news for using their ETF funds to push corporations toward alt-left policies.



Attention: Financial Advisors should be aware of each client’s personal values and should help them invest accordingly and vote their shares.

3. Patriotic Investing

One key value that most American investors share is a love for this nation and a desire to maintain the liberty and security it provides for them and their families.

Sadly, Wall Street and Washington DC have both failed the American people in this regard.



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Through both investments and policy, American industry and American security have taken a back seat to globalist ideals.

“The American people have been waking up. They don’t want all their prescription drugs made in China. They don’t want semiconductor chips with back doors that allow foreign governments to spy on them. Or the American government to spy on them, for that matter. They don’t want enslaved people in sweatshops making goods they use. And they most certainly don’t want to invest in America’s enemies. Wall Street hasn’t caught on yet, or maybe they’re doing this on purpose. But client-facing financial advisors must address this head-on.” –Kevin Freeman, CFA



Look at the history of American investment in Nazi Germany in the early days of Hitler’s rise. Companies like Audi, Mercedes, BMW, Volkswagen, and others saw a massive influx of American investment.

When America joined the Allies after the attack on Pearl Harbor, **all those investment funds were lost.** Hard earned Dollars were instead used by the Nazis to produce military equipment like tanks, planes, and other weaponry.



The Result: American investors had directly funded the war machine that would kill hundreds of thousands of their own sons.

Today, this same practice may be repeating through investments into Chinese technology companies, many of which also develop military technology for the Chinese Communist Party.



Attention: Clients want their financial advisors to be aware of major national security threats and how their money can be used to protect our nation instead of destroying it.



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4. Relationship Building

To be able to discuss these topics with clients, advisors will need to develop strong relationships built on trust.

Life has become incredibly politicized over the last few decades as the major political issues have trended toward morality and world views.

Now, more than ever, people want to know they can trust the people they are working with.



“In order to be trusted, clients will demand that you know what their feelings are and that they’re respected and understood. Even better for clients to know that you’re willing to help them fight for their values. This will require a relationship beyond money.” –Kevin Freeman, CFA

Separating money from the rest of life is a dangerous game, when life has a huge impact on money, and vice versa.

It is essential in trying times like these for clients to know where you stand and trust that you will do what is in their best interest, even if you disagree on a particular issue.

Clients are looking for advisors who can help them use their money to further their values, as well as make a profit.

⚠ Attention: Financial advisors should be developing real relationships with their clients and learning about each other’s values to better determine investment goals.



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5. Politics in Practice

As a part of developing these relationships, politics will be an inevitable conversation. This is a good thing because politics, whether we like it or not, has a huge impact on clients' investments and our daily lives.

Studies show that which party holds the White House has little to no impact on the stock market.

While this may be somewhat true, it ignores the role of Congress, which often makes decisions that directly affect certain stocks and industries.

“You want proof that politics matter? Look how members of Congress get rich. They get rich using insider trading. They perform better than Warren Buffett, maybe the world’s best investor these days. Please. They’re not better investors than Buffett, but they do know what policies they’re going to vote on. And they know that those policies are going to impact the market. This proves that politics matter, and advisors need to wake up to this truth.” –Kevin Freeman, CFA



The bills voted on in Congress often have a greater impact on the markets than many would expect. Massive government funds have been spent on projects that directly benefit specific industries and sometimes even specific companies.



Attention: Understanding the current political landscape and the effect it will have on a client’s portfolio and how it will propel or impede their values is essential when planning for their investment goals.



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6. Parallel Economy

Many Americans have become fed up with the nonsense coming out of Wall Street and DC and are looking for alternative investment opportunities, goods, and services.

With rising demand, new companies have formed what is now known as the parallel economy.

Public Square, one of the largest companies in this sector is an online sales platform that provides small businesses with a safer place to sell their products than Amazon.

RedBalloon provides a job networking platform for non-woke employers to find hardworking, liberty-loving employees.

“In this emerging and parallel economy, where big brands are being formed and built now, you should be aware because there will be many opportunities. There’ll be some good ones and some bad ones, and that’s why clients need advisors to help them. But advisors are of no help if they ignore the parallel economy as it emerges.” –Kevin Freeman, CFA



Rumble, Truth Social, and now X (Twitter) have found ways to provide Americans with free speech while the old platforms, like YouTube, Facebook, and (old) Twitter, decided to focus on censorship.

⚠ Attention: As this parallel economy emerges, advisors will need to help their clients make wise investments to profit from these incredible opportunities by investing in the right companies.



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7. Artificial Intelligence

Right as this parallel economy takes its first steps, a new and trending topic is the advent of Artificial Intelligence.

Artificial Intelligence is, to some, the next stage in the evolution of our civilization. Much like steam power rapidly improved productivity, AI will reduce the amount of labor required for many tasks, allowing humanity to reach new heights.

“AI is going to impact how we invest and what we invest in. It can be used for control or for liberty and advisors must not ignore it... we’re planning an NSIC (National Security Investment Consultant) conference on this topic. It’ll happen in the near future to help advisors understand what AI is and what it is not. How can it improve your workflow? How can it create opportunities for investors?” – Kevin Freeman, CFA



However, as much as AI shows incredible potential for positive impact, it could also be abused and used for evil.

A hot topic recently has been Elon Musk’s challenging of Open AI for no longer being ‘open’. There is a trend toward wokeism in AI, Google’s Gemini being the prime example.

Upon its debut, Gemini was found to intentionally change the narrative of history by replacing white people with people of color, even when asked to make historically accurate images of Vikings.

With major backlash, Google has been forced to step back and rework it, but the damage is done. It is clear that the creators of AI are putting their personal biases into the code.

Clients need to be made aware of these issues, especially as AI is an alluring topic for long-term investors.



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Caution: Artificial Intelligence is the new buzzword for what appears to be a new leap in technology and human productivity. While it presents awesome opportunities, it also poses a great threat to liberty

ACTION STEPS:

- 1. Apply these seven truths to your practice. There is a huge unmet need in the patriotic investor class and clients looking to align their money with their values. Help your clients invest in accordance with their liberty, security, and values.**
- 2. Consider becoming a member of the NSIC Institute. LSV advisors are uniquely positioned to attract new clients and better serve existing clients. You can learn more here (NSIC.org).**
- 3. Stay informed about the companies in your investment portfolio, especially their stance on and reactions to ESG pressures. Use this information to make investment decisions that align with your values.**
- 4. Recognize we are in an economic war, and it is the financial advisors that are on the front lines to helping America win this battle.**



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In the **Economic War Room®** and at the **NSIC Institute**, we encourage Americans to be the “little ships that make the difference.” You cannot solely rely on the government or the president to solve America’s problems. You have to make a difference. It is up to you to help take our country back and create a voice for economic liberty. [The little ships are based on Churchill’s Operation Dynamo that rescued the British Expeditionary Forces in the Miracle of Dunkirk.]

SHAREABLE QUOTES:

“Advisors need to understand culture.
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money regardless of the impact of society.”

–Kevin Freeman, CFA

“We’ve covered seven trends, and none of
these seven is a regular part of advisor
practices, yet every one of them is essential.
That’s why we created the NSIC Institute.”

–Kevin Freeman, CFA

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