

Background Briefing: We say it all the time, we are in an economic war! American ingenuity is the envy of the world, and we are seeing foreign players tap into our economic success through our capital markets. Not surprisingly, our critical national security technologies are increasingly funded by foreign sources giving them access to the technology. The Defense Department is beginning to take small steps to address the issue and is looking for patriotic investors. The Economic War Room wants to work with you to help mobilize US investment and play a critical role in protecting our nation.

"We face off against new geopolitical threats every week in the Economic War room. Whether it's EMP, socialism, bear markets, energy wars, or hackers. There's always a new challenge and we do our best to give you solutions, practical things you can do to weaponize your money to protect your family and our nation.

But investing seems a little overwhelming at times, especially if you feel like you're alone. That's why we need investment advisers that understand these issues. These are people who should accompany you and even take the lead

at times when we're dealing with personal finances to overcome the challenges and the problems that we face." —Kevin Freeman, CFA



Your Mission: To be an Economic War Room patriot, and to learn how you can work with your financial advisors to weaponize your money, protect yourself, your family, and America.

Second, if you do not have a financial advisor, learn how to seek out an advisor that aligns with your values.

Weaponize Your Money Defined: There are three things you can do with your money and all three should align with your values of giving, investing, and spending. Think it doesn't matter? Consider what those opposing your values are doing with their money.

(OSINT)- Open Sourced Intelligence Briefing

Kevin Freeman shares the vision of pro-America investing and ensuring you develop a plan to grow and protect your investments. Also, this includes highlights and previous interviews with financial investment leaders, John Mauldin, and David Tice. Energy expert Troy Andrews shares his insights on the industry and this highlights the need for professional assistance.

Watching the news, It seems like everything is being weaponized. Ultimately, we are in an economic war, where major geopolitical events can impact your investments.

1. How you fight an economic war, and why you may need a financial advisor to do so.

- People are emotional creatures, and it is good to have another perspective.
 - » How would you respond if your investments dropped 40% in a bear market?
 - » A good advisor can help walk you through the challenges of a bear market.
 - » Ideally, you may want to have a plan with hedges in place.
- The era of "normal" for financial markets may be ending. If true, investors will need qualified advisors who understand the dynamics at work.
- Many investors look backwards to determine the best way to move forward.

- There has been a whole movement in the investment world to simply buy and hold on to the S&P 500 index, representing 500 of the largest companies in the stock exchange.
- While index investing has worked extremely well for the last 10 years, with the dynamics changing all around us, this may or may not make sense going forward. See more on [Episode 05 Stock Market Volatility – Economic Battle Plan™](#)

“I think one of the misunderstood points of indexing is that it is really momentum investing. As the index goes up, you buy more of those assets. Therefore, it creates greater price elevation and it puts the overall market more at risk. And frankly it’s not rewarding the best behavior and the most efficient companies. I’m completely opposed to index.” –David Tice



“What happens over 10 years when you’re in a bull market like we’ve been, you think you don’t need a risk budget. But one day you’re going to be down 40 or 50 percent and the adviser is saying, “Oh well, that’s just a bear market. There’s not anything I could have done about it.” What you should have been doing is budgeting that risk. (setting aside a portion of your gains along the way).” –John Mauldin



Note: Depending on your age, there may not be time to make up for the loss in a seriously down market. Make sure you have a risk plan in place now!

2. IF YOU DO NOT YET HAVE A FINANCIAL ADVISOR, CONSIDER FINDING ONE!

We believe it could be critical that you find someone that can help guide you through the investment process and your needs. **THE RIGHT FINANCIAL ADVISOR WILL CONSIDER THREE KEY ELEMENTS.** These include understanding your goals, knowing the market climate, and a new third element—understanding the External Factors or “X Factors.”

Many financial advisors excel in the first two efforts and it has worked well through normal market circumstances.

a) Understanding your goals

- » Your needs
- » Your wants
- » Your desires
- » Your situation

b) Market climate and anticipating economic trends

- » What areas of the economy are growing?
- » Are there recession risks?
- » Inflation trends?
- » Emerging technologies?
- » Changing consumer behaviors?

Today there is a new third element, or “X Factor”, that can impact your money:

c) The “X Factor” involves external factors that can completely change the market impacts.

Today, everything is being weaponized and geopolitical events are adding a new dynamic to financial markets. Even the major investment houses acknowledge these new dynamics, but they also admit that they are not fully prepared to address or understand many of these external threats.



In the Economic War Room, we talk about these “X Factor” threats all the time. What is China planning to do with 5G? Is North Korea going to launch an EMP and how would that impact the market? What happens when people try and influence our universities and steal our technology with IP theft?

Other considerations for finding the right financial advisor for you:

- You understand that financial markets get complicated, so you’ll want someone with experience.
- You may already have a stockbroker, insurance agent, financial planner, or CPA. Ideally you have someone you truly trust, but whoever it is they need to be working for you and be on your team.
- If you don’t have a financial adviser, again, look for someone you can trust. Look around, there are all kinds of people with all kinds of credentials in the investment world.
- In the link section of this economic battle plan, we provide a few resource guides to locating a good adviser.
 - » You’ll learn things like using word of mouth referrals
 - » Searching through advisor databases using an online matching service.
- You should look for individuals or companies with a good reputation. There are ways to check compliance records and you can verify credentials. But finding the right match is more than just finding someone who’s competent and trustworthy. This is a relationship after all, you really need to find someone who gets you.
- The truly important piece of this is that your adviser needs to recognize your personality needs, wants, desires, and capabilities to build a decent financial plan. Your adviser must truly understand what you have now and what you’re trying to achieve. That’s pretty standard stuff in the financial planning world but really, it’s unique to you.

- » Did you receive an inheritance?
- » Do you plan on leaving an inheritance?
- » What's your income?
- » What are your spending habits?
- » Do you have a savings plan or retirement plan?
- » Too often people think of investing as just picking the hot stock or timing the market. Yes, those weigh in, but simply recognizing the next Amazon, Apple, or Netflix is not enough for a solid financial future.
- » You may need more than one advisor; you probably need at least one. It's a rare individual who can be dispassionate enough to handle his own money.

Next, Let's review examples of how a financial advisor plays a critical role to helping guide your strategy.

Concerned about the market going down? There are multiple options a financial advisor can consider for you.

Defensive Strategies that Advisors may consider:

A. One approach is to move funds to cash or gold.

If you think that the market's going to fall, it can get a little complicated:

- Do you want physical gold or exchange traded funds that hold gold? Or do you want gold bars, gold coins, rare coins, gold-mining stocks, or maybe silver?
- What about bitcoin?



- If cash, what currency do you want to hold?
 - Another approach is to use hedges like put options. Do you know how they work? Are you comfortable in using them?
- B. The VIX and put options can offer a defensive hedge. (If this is of interest, we suggest working with an advisor that understands how to apply this concept.)

The VIX defined: - The CBOE Volatility Index, known by its ticker symbol VIX, is a popular measure of the stock market's expectation of volatility implied by S&P 500 index options. It is calculated and disseminated on a real-time basis by the Chicago Board Options Exchange (CBOE), and is commonly referred to as the fear index or the fear gauge. Source: Wikipedia

"As it relates to being hedged and I'm a big believer in put options, and frankly they're not that complicated. We're being given a gift when the VIX which is the volatility index is low. So, when the VIX index is low, it allows you to buy protection very inexpensively." -David Tice

"I'm not just talking about buying the VIX. I'm also talking about buying put options on indices or on individual stocks. The CBOE, as an example, has put options on all the big stocks." -David Tice

If you think some segments of the market may be going up, there are multiple options a financial advisor can offer.

One example is energy.

Let's say you see oil prices rising from geopolitical impacts. How should you invest?

A. Using Oil Futures is one option. Should it be oil or natural gas futures? Or should you just be purchasing oil company's stock? Which company?

B. Next, should you invest upstream, down-stream or mid-stream. See [Episode 04 and Economic Battle Plan™](#) for more information.

Looking at the example defensive and offensive strategies, you can see how it may be helpful to have an advisor working with you to sort through the options. Plus, there are exciting emerging technologies that you may want to be on the leading edge with your investments.

Once you sort through the above examples, there is one more thing – **YOUR VALUES and YOUR MONEY!**

3. The Growth and the Rise of Values Investing

“The problem, when you think you got it right, you may be wrong. You still have to deal with things like time horizon, risk tolerance, and asset classes. You also have to decide whether your investment advisor's investments line up with your personal beliefs.” –Kevin Freeman

Do your investments align with your values? Investing Offensively toward your values and what you believe.

- Cerulli and Associates, a financial research firm, sees a new growth niche with values-based investments and socially-responsible investing (SRI). There is mounting interest in making a positive impact with client investments and wealth.
- SRI strategies among RIAs are growing, but not necessarily toward pro American values. In the Economic War Room, we believe it is time to stand for America and create a unified voice through pro-America investing.
- Another area gaining momentum is Biblically Responsible Investing (BRI), which is investing in companies that align with biblical values. There are companies that filter investments based on your values. One example of this would be The Timothy Plan.

Your Financial advisor could be a candidate for our new Advisor Training sessions available this year!

4. Introducing new resources for your financial advisor at the Economic War Room and the National Security Investment Consultant Institute ([NSIC.ORG](https://www.nsic.org)).

The Economic War Room will continue to cover geopolitical threats and emerging investments around new topics like space warfare, 5G phones, the Internet of Things, and technology to secure our borders.



“Every one of those topics and dozens more offer investment opportunity. The key is to have an adviser help you sort it out. There can be a beautiful future ahead for our nation and for astute investors like you!”

—Kevin Freeman

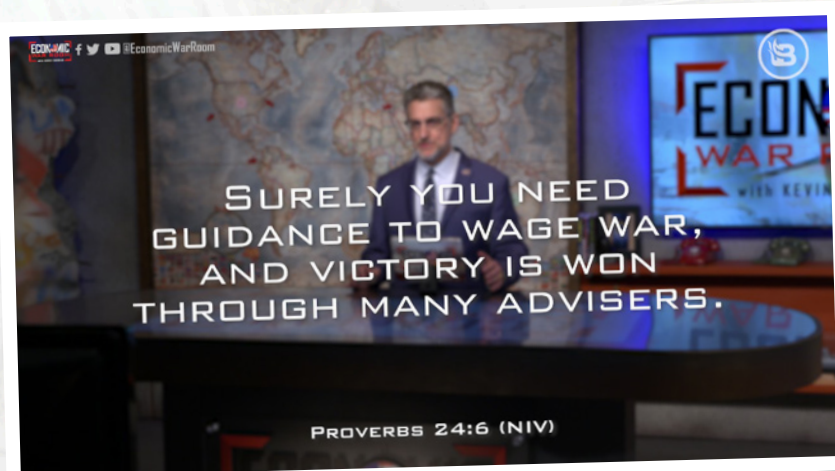
- We are looking for financial advisors willing to break from the norm and work with their clients to help protect your investments and weaponize your money.
- How do you find an advisor who understands that China is working against us or Mexico or Europe or the economic war at home?

Two NSIC Founder's classes served as a pilot and proved the interest and need for financial advisors across America:

We did a pilot training program to see if advisers would be interested in learning how our national security integrates with protecting clients from economic warfare.

- One was in Bartlesville Oklahoma, at the Oklahoma Wesleyan University's Frank Keating Center.
- The other was in Washington D.C. at the Hillside College Kirby Center.

We trained some of the best advisors in America and we brought in some of the top experts in banking, the markets, and military intelligence agencies. They met, they interacted, and they discussed how they could protect and help clients prepare for what may be coming.



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"One fellow reached out of the blue to me in about 2008-2009. Kevin Freeman was hired by the Pentagon to study economic warfare. I didn't think there was even a name for economic warfare back then, let alone an effort study this field and to figure out it was there. There was a group within the Pentagon that studies irregular things and all. Kevin sort of came across my work and we started talking. It was just amazing to me that people couldn't see it until then. But with Kevin it was like he was the first honest man. We talked for hours the first time and he had figured out all this stuff on his own. So, you're really getting the first string here and a fellow who can think for himself."

—Patrick Byrne— Founder and CEO [Overstock.com](https://www.Overstock.com) and
Blockchain thought leader



In the third quarter of 2019, we are scaling the NSIC training efforts and conducting sessions virtually for financial advisors from the Economic War Room. Your advisor can qualify for CFP-CE credits and gain perspectives not obtained anywhere else in the market.

The Institute will be a gathering place for like-minded investment professionals to connect and share ideas.

It will also be a powerful force for good in America. This group of advisors will represent billions and eventually trillions in assets, creating a force that equals the DC lobbyist/crony capitalism crowd, and even countries like China and Saudi Arabia (that often use money to ensure DC represents their interest).

**Economic Patriots like
You Can Make A Difference!**

Why You Should Care:

1. You recognize America is in an economic war. Our major adversaries are engaging in an economic war against the US.
2. Index investing works well in a up market but might be disastrous in a prolonged down market. You want to be positioned for success with knowledge.
3. Robo Advisors cannot factor in the X factor. You see the need to have a financial advisor that understands the complete picture.
4. DC responds to votes and money, working together in these areas Americans can make a difference.
5. You believe that where you put your money should align with your values.
6. You want a financial advisor that understand all 3 factors in managing your investments.
7. You want to weaponize your money and have your financial advisor on the front lines of the economic war America is facing.
8. You understand that in DC and on Wall Street, MONEY makes a difference. You want to be part of a team of Economic Patriots that makes a difference. In the Economic War Room, we encourage Americans to be the "small ships that make the difference." You cannot rely on the government or the president to solve your problems. You have to make a difference. It is up to you to help take our country back.



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Economic Patriot Action Plan

Step 1: Go to economicwarroom.com/advisor to nominate your financial advisor for consideration as an EWR/NSIC advisor. Once your financial advisors contact information is registered and we can start the process. There will be a brief interview and they will receive more details on our virtual classes and what they can expect from the Economic War Room.

Step 2: Do this now! Have a financial action plan based on multiple geopolitical scenarios developed now. Advanced preparation is key. Trying to figure what to do when an economic event happens is usually too late.

Step 3: If you need to find a financial advisor, let us know. We may develop a list of NSIC/ EWR advisors interested in helping you.

Step 4: Consider what can you do now to help strengthen America or even help someone in need. Keep in touch with your congressional representatives. Choose from the list or set your own goals:

- ➔ Get others to sign up and review our weekly Economic War Room Economic Battle Plans™. Each of these will address critical solutions to the threats highlighted on this briefing.
- ➔ Subscribe to our weekly [Economic War Room show on TheBlaze](#). We need to break the digital ghetto that is limiting free speech regarding truth and liberty.
- ➔ Follow, like, comment and share on [Facebook](#) and [Twitter](#). [We recognize these tools may be compromised at times, but when they are not filtered, they can be major platforms available to reach out to the public.



→ Share this Economic Battle Plan™ and our short video segments on Facebook or YouTube with friends. We set up the Economic War Room to be your resource for information, preparation, and mobilization.

→ Think about ways you can mobilize or weaponize your money towards things that strengthen American. This can be through charitable giving, spending, or investments.

**Thank you for accepting this mission.
Together, we will make a difference!**

SHAREABLE PHRASE:

(share this quote with your friends or at the office)

“What we see as the marketplace, our enemies view as the battlespace™.”

–Economic War Room

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The EWR Collection Deck

From Kevin Freeman

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[How to find a Financial Advisor](#)

[Hedging Strategies](#)

[BRI, SRI, and Value Investing](#)

[+] Must Read/Watch

NSIC INSTITUTE

[+] <http://www.nsic.org/>

HOW TO FIND A FINANCIAL ADVISOR

How to Find and Choose a Financial Advisor

<https://smartasset.com/financial-advisor/how-to-find-a-financial-advisor>

5 Best Search Engines to Find a Financial Advisor

<https://www.thebalance.com/find-financial-advisor-online-2388455>

How to Choose a Financial Planner

<https://guides.wsj.com/personal-finance/managing-your-money/how-to-choose-a-financial-planner/>

How to Find a Financial Advisor/Planner

<https://www.investopedia.com/updates/find-financial-advisor-planner/>

A New Way To Find A Financial Planner

<https://www.forbes.com/sites/nextavenue/2018/12/09/a-new-way-to-find-a-financial-planner/#2c1a10e81bae>

[+] How to Hire a Financial Advisor

<https://www.daveramsey.com/blog/how-to-hire-a-financial-advisor>

Where to Find the Best Financial Advisor

<https://www.suzeorman.com/blog/where-to-find-the-best-financial-advisor>

How to Find a Financial Advisor That's Right for You in 7 Steps

<https://fitsmallbusiness.com/how-to-find-a-financial-advisor/>

How to Find a Financial Advisor

<https://www.barrons.com/articles/the-pros-show-you-how-to-find-the-fight-financial-advisor-1543613228>

6 Steps to Finding a Great Financial Adviser

<https://www.kiplinger.com/article/investing/T023-C000-S002-6-steps-to-finding-a-great-financial-adviser.html>

HEDGING STRATEGIES

A Beginner's Guide to Hedging

<https://www.investopedia.com/trading/hedging-beginners-guide/>

Practical and Affordable Hedging Strategies

<https://www.investopedia.com/articles/optioninvestor/07/affordable-hedging.asp>

Hedging and How It Works With Examples

<https://www.thebalance.com/hedge-what-it-is-how-it-works-with-examples-3305933>

7 Hedging Strategies: Whatever Happens, You Don't Care (Video)

<https://seekingalpha.com/article/4115522-7-hedging-strategies-whatever-happens-care-video>

The Upsides And Downsides Of 4 Popular Hedging Strategies

<https://seekingalpha.com/article/4132044-upsides-downsides-4-popular-hedging-strategies>

5 Simple Hedge Strategies for Volatile Times

<https://www.forbes.com/sites/thestreet/2012/02/27/5-simple-hedge-strategies-for-volatile-times/#7ef3f2ab6b59>

Finance Professor: Five Hedging Techniques You Must Know

<https://www.thestreet.com/story/10364131/1/finance-professor-five-hedging-techniques-you-must-know.html>

BRI, SRI, AND VALUE INVESTING

Biblically responsible investing movement exploding

<https://www.christianpost.com/voice/biblically-responsible-investing-movement-exploding.html>

[+] Biblically Responsible Investing Institute

<https://www.briinstitute.com/>

Understanding BRI

<https://christianinvestmentforum.org/biblically-responsible-investing/>

Introduction to Biblically Responsible Investing

<https://www.inspireinvesting.com/2017/10/06/get-started-biblically-responsible-investing/>

[+] Biblically Responsible Investing for Over 25 Years | Timothy Plan®

<https://timothyplan.com>

eVALUEator | Biblically Responsible Screening Tool

<http://evaluateator.com/>

Biblically Responsible Investing: A Lucrative Niche for Advisers

<https://www.wsj.com/articles/biblically-responsible-investing-a-lucrative-niche-for-advisers-1496934820>

Socially Responsible Investment (SRI)

<https://www.investopedia.com/terms/s/sri.asp>

The State of Socially Responsible Investing

<https://hbr.org/2019/01/the-state-of-socially-responsible-investing>

Best Brokers for Socially Responsible Investing 2019

<https://www.nerdwallet.com/best/investing/brokers-socially-responsible-investing>

The Pros and Cons of Socially Responsible Investing

<https://www.doughroller.net/investing/pros-and-cons-of-socially-responsible-investing/>

What Is Socially Responsible Investing (SRI) – Types & How to Get Started

<https://www.moneycrashers.com/socially-responsible-investing/>

Socially Responsible Investing: How to Align Your Values With Your Portfolio

<https://www.fool.com/investing/2019/04/11/impact-investing-how-to-align-your-values-with-you.aspx>

Investing when you hate capitalism. Is it possible?

<https://www.ridedefreefearlessmoney.com/blog/2016/03/investing-when-you-hate-capitalism/>

[+] Socially Responsible Investing Has A Politics Problem

<https://www.forbes.com/sites/zachconway/2019/04/02/socially-responsible-investing-has-a-politics-problem/#7d90d6e07140>

The Origins of Socially Responsible Investing

<https://www.thebalance.com/a-short-history-of-socially-responsible-investing-3025578>

Why Socially Responsible Investing Is Not for Me

<https://www.kiplinger.com/article/investing/T052-C016-S002-why-socially-responsible-investing-is-not-for-me.html>

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