Specialty Investing Readiness Checklist

Specialty Strategy	Am I Ready? (Yes/No)	Key Readiness Question	Notes / Next Step
Tactical Asset Allocation		Do I have a long-term strategy I'm temporarily adjusting — not abandoning?	
Options Trading		Do I understand volatility, strike prices, and time decay?	
Using Leverage (e.g., Margin, Leveraged ETFs)		Can I repay borrowed capital even if investments decline in value?	
Private Equity / Venture Capital		Do I fully understand lock-up periods, fees, and risk-return tradeoffs?	
Real Estate Syndications / Alternatives		Am I okay with illiquidity and delayed payouts?	