

# Choke Points

*How to Identify, Obtain, & Defend Strategic Positions to Attract Capital, Deal Flow & Clients*



*By Richard C. Wilson*

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# Family Office Club

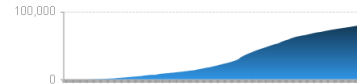
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MEMBERS

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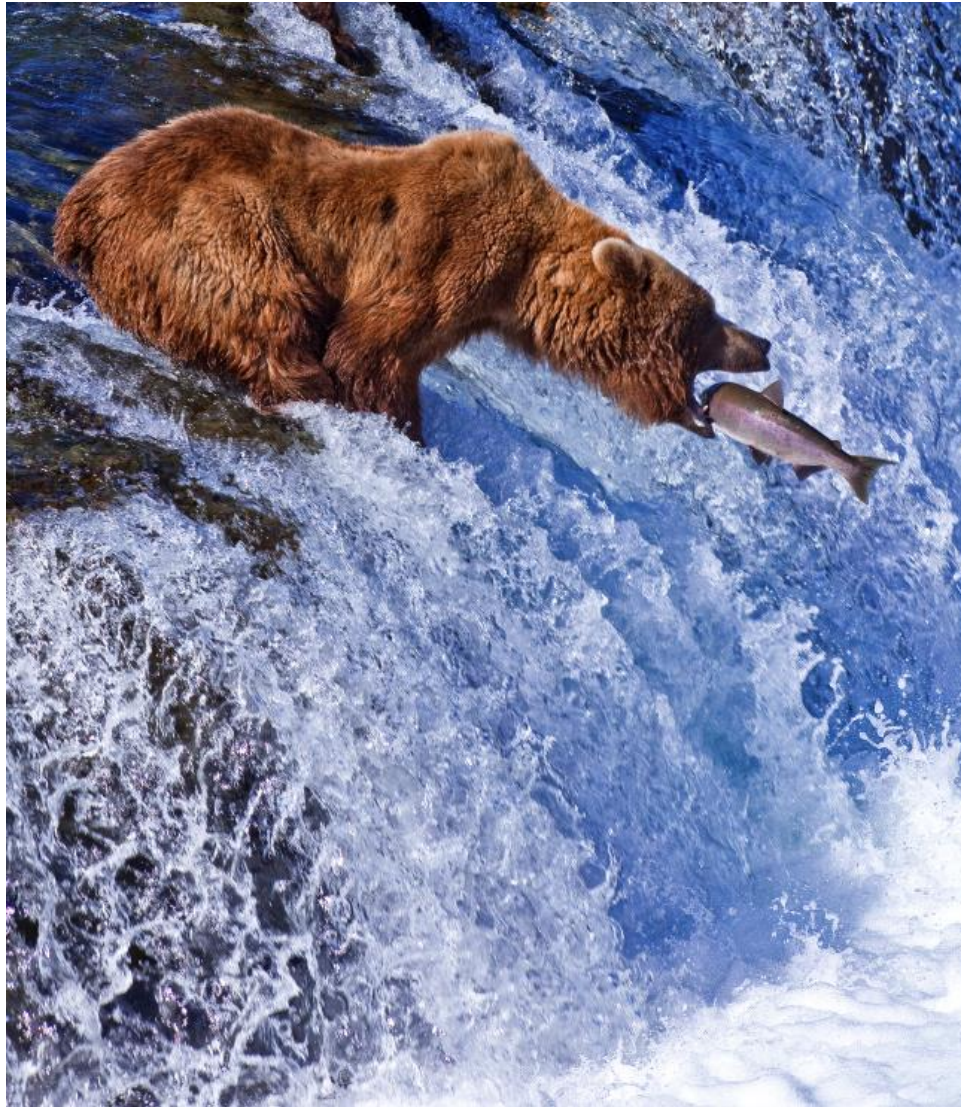
# Today's Webinar

- Choke Points
- Understanding Why Choke Points Matter
- How to Identify Choke Points in Your Business
- Choke Points & Capital Raising
- Choke Points & Business Development
- Choke Points & Deal Flow

# Triple ROI



# Attracting Clients to You



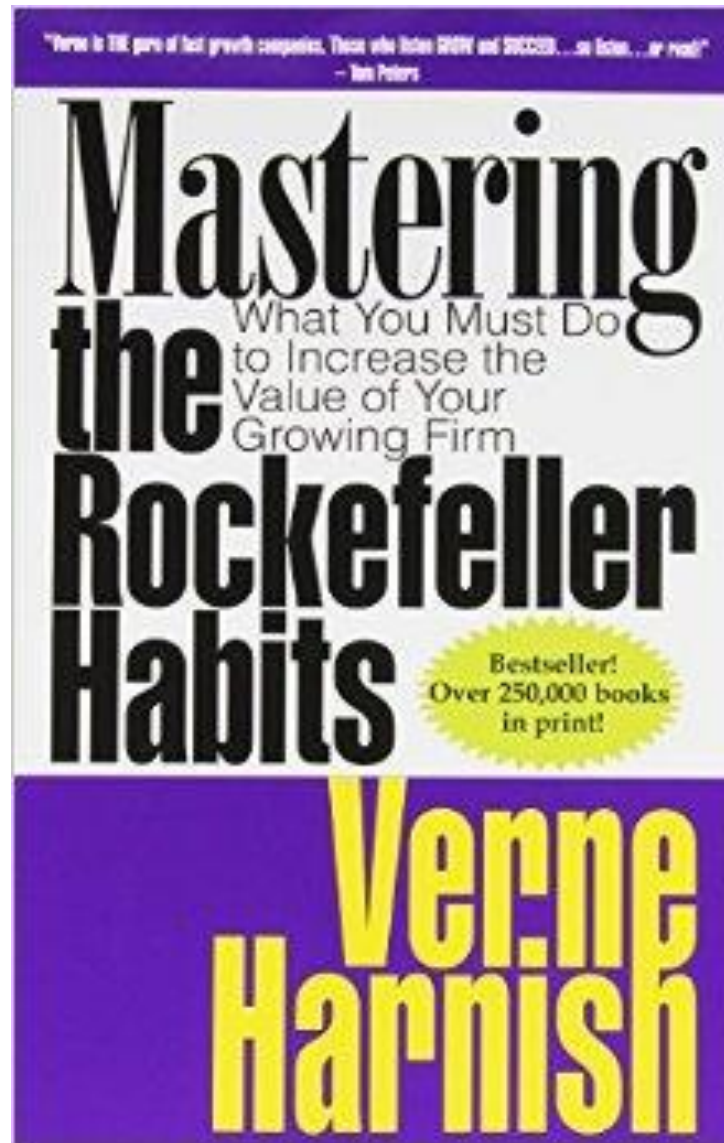
# What is a Choke Point?

A Choke Point originated as a military term for a geographical point such as a valley or a bridge where a unit has to traverse in order to reach its objective. Because only a limited number can pass through the narrow point, it gives the defender an advantage in having to only battle a small number at a time passing through the choke point. An example of a choke point is the narrow, winding Strait of Hormuz (pictured right).



For our purposes, a choke point is a particular point in the supply chain or in an industry that gives the person controlling the choke point a distinct advantage. Similar to the military strategy above, by controlling the choke point, competitors or clients will need to pass through the choke point in order to achieve their objective.

# The Rockefeller Habits



# Flavors of Checkpoints

Cost Centers

Distribution Access

Media Properties

Protectable IP

Research/Timing/Knowledge Edge

Geographical Landscape Approach

# Billionaire Choke Point - Case Study



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# Billionaire Choke Point - Case Study #2





# The Miami Family Office

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**Miami**, Florida – March 16, 2016 – **WE Family Offices**, the independent, family-focused wealth management firm based in **Miami**, FL has been named Best.

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## Miami Family Office | LinkedIn

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The **Miami Family Office** is a single family office based in the United States with offices in Miami, San Francisco, New York, and Portland. We are focused ...

## About Us | Single Family Offices

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Richard has met with over 1,000 family offices in 23 countries and shared his ... At the **Miami Family Office** and Billionaire Family Office, Theodore originates ...

## Fastest-Growing Family Office Rides Rise in Ultra-Rich - Bloomberg

[www.bloomberg.com/.../fastest-growing-family-office-rides-rise-in-ul...](http://www.bloomberg.com/.../fastest-growing-family-office-rides-rise-in-ul...) ▾ Bloomberg L.P. ▾

Nov 5, 2014 - Elliot Dornbusch runs a **family office** in **Miami** for a select group of clients -- and he wants to keep it small.

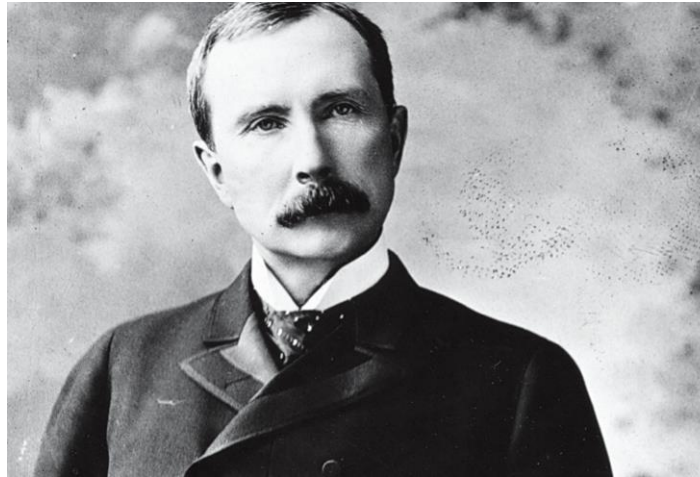
# CPA Firm or Service Provider Choke Points



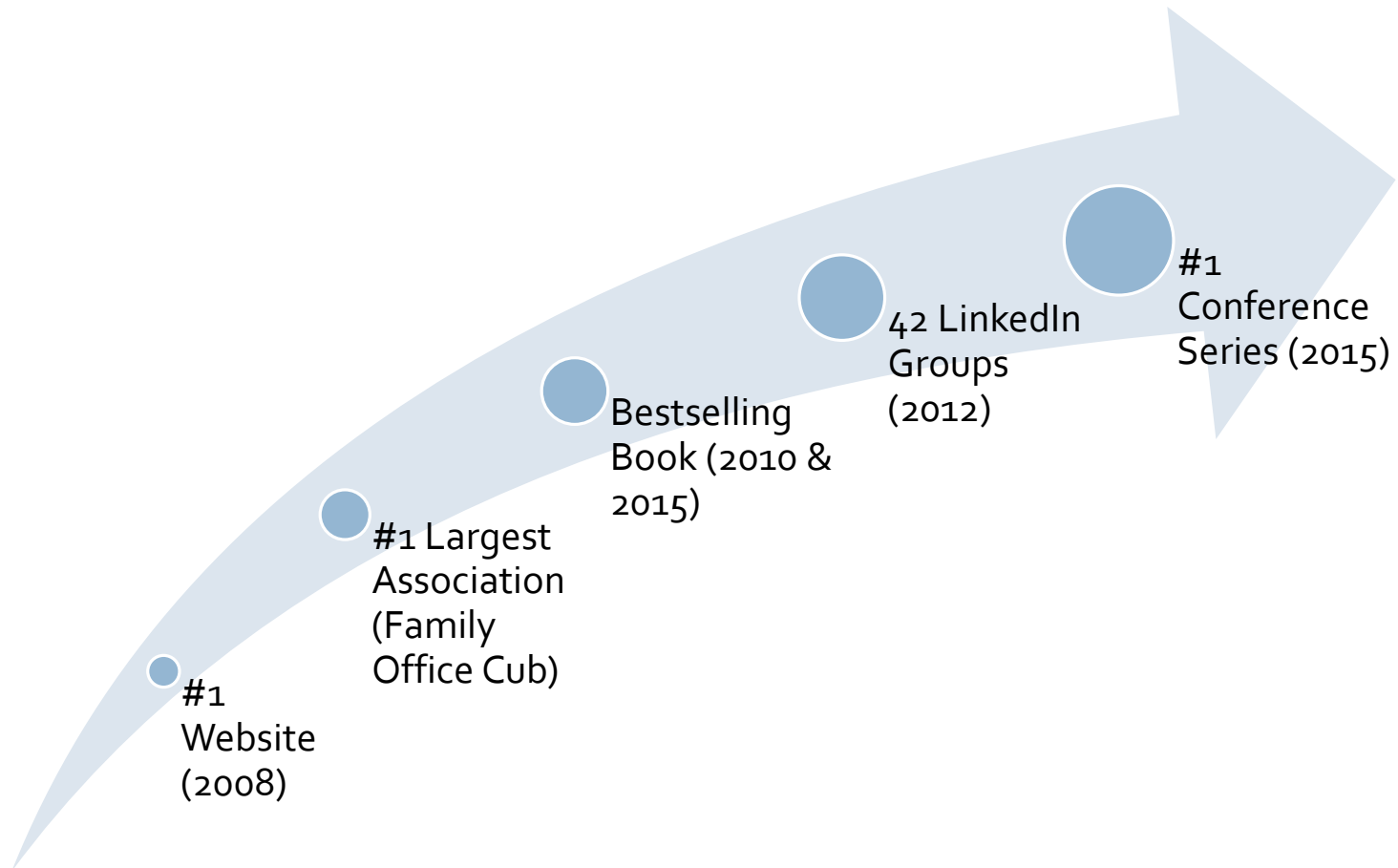
# Mineral Rights Case Study



# How Choke Points Can Change Your Business

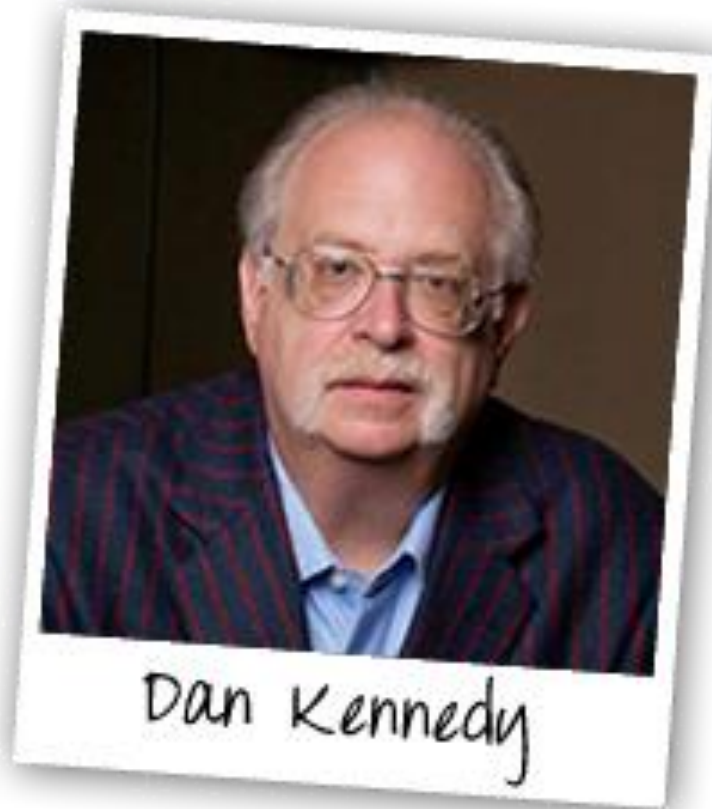


# Choke Points Changed My Business



Most importantly this resulted in equity stakes, 7 figure business, 8 figure counting equity holdings, and growing team.

# Most Dangerous Number is 1



# Examples...



In retail, owning the property of the most popular retail locations in a city. In order to open a shop, a business will need to apply for a lease from you so you can lease out space only to businesses that do not compete with your own.

## Examples...



In real estate, a developer also operating a brokerage firm so that real estate sales are executed using the brokerage firm and thus giving the developer a competitive advantage in terms of market intelligence, transaction prices, insights into other developer's activities, and a Rolodex of buyers and sellers.

# Examples...



In investment banking, setting up an agreement with the #1 corporate law firm in the region so that you get first word on a new merger, bankruptcy, sale, or other transaction that you could be involved in.

# Peter Thiel – Anticipating the Future and Controlling the Choke Points that *Will* Matter



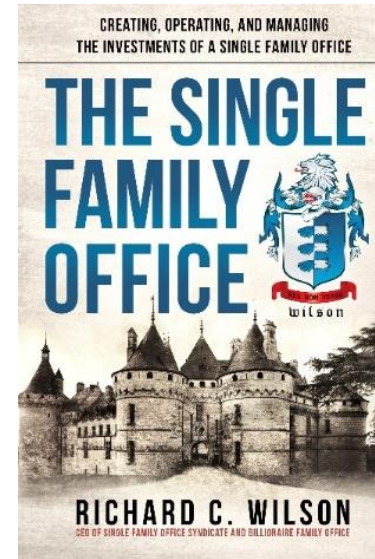
**PETER THIEL**

Technology Entrepreneur, Investor, Philanthropist

# Connect Directly



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