

A clear path to greater financial independence & building wealth that endures.



Responsible Access

We expand private market to accredited and non-accredited investors without lowering underwriting standards and compliance oversight.



Education that Empowers

We make complex asset classes completely comprehensible. Informed investors make better decisions and build stronger, more confident portfolios.



Disciplined Cashflow

We prioritize capital preservation over maximum returns and stable monthly income over speculative gains.

About Bequest Asset Management

Bequest Asset Management expands access to private market investments for accredited and non-accredited investors alike. Every decision we make is structured around one standard: our investors' interests come first.

\$60M

Equity Under Management

550+

Active Investors

20+

Consecutive Monthly Distributions

Designed for all investors seeking predictable monthly income and tools to build lasting financial independence.

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Asset-Backed Bonds, Designed for All Investors

Bequest Traditional Bonds

The Bequest Traditional Bond Series offers a straightforward entry point into private real asset income. Backed by U.S. residential repurposing mortgages diversified across 50 states, these bonds deliver high fixed rates backed by real assets with flexible maturity options, accessible to both accredited and non-accredited investors.

	5-7% Bond	8% Bond	9% Bond
Annual Yield	5-7% APY	8% APY	9% APY
Term	Immediate to 1-Year Maturity	2-Year Maturity	3-Year Maturity
Minimum Investment	\$1,000	\$10,000	\$25,000
Best For	Liquidity & Flexibility	Short-Term Income Goals	Maximum Yield

Evergreen structure allowing investors to stay invested as long as they choose, with the flexibility to reinvest anytime.

Bequest Income Builder Series

The Bequest Income Builder Series offering unique principal & interest bonds designed for amortized monthly principal and interest income. A series built to allow investors to move beyond static yield and toward repeatable, scalable income generation.

6.0%

**Principal & Interest
paid monthly.
\$1,000 minimum,
2-Year term.**

7.0%

**Principal & Interest
paid monthly.
\$10,000 minimum,
3-Year term.**

8.0%

**Principal & Interest
paid monthly.
\$25,000 minimum,
4-Year term.**

9.0%

**Principal & Interest
paid monthly.
\$50,000 minimum,
5-Year term.**