

Build an AI That Thinks Like You Invest

The Serious Investor's Guide to ChatGPT, Claude & Gemini

ChatGPT

Claude

Gemini

Presented by The Norris Group & White Feather AI

What You're Actually Building

Not a chatbot. Not a toy. You're building:

■ A decision accelerator	Faster analysis on every deal — from idea to clarity to action in minutes, not hours.
■ A thinking partner	One that knows YOUR business, strategy, goals, and how you like to work.
■ A force multiplier	Whether you use ChatGPT, Claude, or Gemini — the system is the same. Setup steps differ slightly.

Platform Quick Reference

Feature	ChatGPT	Claude	Gemini
Best for	Power users & plugins	Deep reasoning, long docs	Google Workspace users
Custom instructions	Yes — robust (2 fields)	Yes — via Projects	Yes — Gems
Memory	Yes — persistent, auto-learns	Yes — within Projects	Limited / Google profile
Conversation threads	Yes — chat history	Yes — Projects	Yes — conversations
Free tier	Yes (GPT-4o mini)	Yes (Claude.ai)	Yes (Gemini free)
Full features	ChatGPT Plus \$20/mo	Claude Pro \$20/mo	Google One AI \$20/mo

■ LAYER 1 Custom Instructions

The operating system of your AI assistant

Every response is filtered through these instructions — before you ask a single question.

1	Identity + Role "You are my strategic advisor for real estate investing — call yourself Maverick"
2	Communication Style "Be direct and concise. No fluff. Use bullet points for action items."
3	Decision Framework Filter every answer through: Revenue Impact → Speed to Execute → Scalability → Risk Level
4	Output Preferences "Start with the bottom line. Give me next steps at the end of every response."

5

Behavioral Rules

"Push back on bad ideas. Ask clarifying questions when my request is vague."

PRO TIP

You can tune personality with percentages: "Be 20% more aggressive," "Be 30% more concise." It actually works.

How to Set Custom Instructions by Platform

Feature	ChatGPT	Claude	Gemini
Where to find it	Settings → Personalization → Custom Instructions	Settings → Profile → two text areas	Gemini → Create a Gem
Two input fields?	Yes: About you + Response style	Yes: About you + How to respond	Single Gem prompt
Applies to	All chats globally	All chats + enhanced in Projects	Chats using that Gem
Character limit	~1,500 chars per field	~1,500 chars per field	Varies by Gem
Multiple profiles?	No — one global set	Yes — one per Project	Yes — multiple Gems
Best practice	Under 800 chars; be specific	Use Projects per deal type	Create separate Gems per use case

LAYER 2 Memory

The long-term brain of your assistant

SAVE THESE ✓

- Business goals and portfolio targets
- Active projects and current priorities
- Your preferences and communication style
- Key relationships — team, lenders, partners
- Market focus — geography, asset class, strategy

SKIP THESE ✗

- Random one-off questions
- Temporary situations
- Noise that clutters the context

PRO TIP

When something matters, say it explicitly: "Remember this going forward." You're training it, not just using it.

Memory Features by Platform

Feature	ChatGPT	Claude	Gemini
Memory type	Persistent (auto + manual)	Project context (manual)	Google profile + limited
Auto-remembers?	Yes — learns from conversations	No — set in Project instructions	Partial — from Google account
Add manually	"Remember that I..." or Memory settings	Write into Project system prompt	"Always remember that..." in chat
View/edit	Settings → Personalization → Memory	Open Project → Edit instructions	Limited — Google settings
Across chats?	Yes — global memory bank	Yes — within same Project	Limited

■ LAYER 3 Conversation Threads The secret weapon — deep focused context

Each thread is a specialist version of your AI. Stay on topic inside each one for sharper answers.

<p>■ Deals Active acquisitions, underwriting, LOIs</p>	<p>■ Market Research Market analysis, comp pulls, trend tracking</p>
<p>■ Investor Relations LP updates, communication, capital raising</p>	<p>■ Operations Property mgmt, vendors, systems</p>
<p>■ Content & Marketing Social, email campaigns, webinars</p>	<p>■ Personal Strategy Goals, planning, big decisions</p>

■ PRO TIP
Treat each thread like a specialist. Your "Deals" thread becomes a deal analyst. Your "Content" thread becomes a copywriter. Don't mix topics — it dilutes context.

■ LAYER 4 Flow Engineering Advanced mode — your unfair advantage

- 1 Set Clear Targets**
"What does success look like in the next 60 minutes?" / "What's the one win I need today?"
- 2 Use Scoreboards**
"We're at 2 of 5 tasks complete — what's next?" / "Next milestone: get the LOI drafted"
- 3 Add Challenge**
"Push me, but keep it winnable" / "What's the ambitious version of this plan?"
- 4 Future Pacing**
"Show me what this deal looks like in 12 months if everything goes right"
- 5 Tune Personality**
"More energy on this one" / "Be more direct — I need to make a fast decision"

■ NEW Configure for Your Strategy Your instructions should match how you invest

Element	Fix & Flip	Buy & Hold / BRRRR	Note Buying / Creative
Role	Speed-focused deal analyst. Prioritize ARV, rehab scope, exit timing.	Long-term wealth advisor. Prioritize cash flow, debt coverage, appreciation.	Deal structurer and risk analyst. Prioritize yield, borrower profile, exit options.
Decision filter	Profit margin, rehab risk, days on market, contractor availability	Cash-on-cash return, cap rate, rent-to-price ratio, landlord-friendliness	Yield, LTV, borrower equity cushion, legal recourse, default risk
Key metrics	ARV, purchase price, rehab budget, holding costs, net profit	Monthly cash flow, cap rate, GRM, vacancy rate	Interest rate, UPB, equity position, default risk, exit strategy
Output style	Fast, decisive. Go/no-go with key numbers up front.	Analytical. Model multiple scenarios with long-term projections.	Detail-oriented. Flag legal/structural risks. Always worst-case scenario.

Element	Fix & Flip	Buy & Hold / BRRRR	Note Buying / Creative
Memory	Active flips, MAO formula, target markets, contractor range	Portfolio holdings, target cash flow/door, refi thresholds, lenders	Active notes, yield targets, servicer contacts, foreclosure timelines
Thread structure	One thread per flip. Archive when sold.	One thread per property or market. Ongoing.	One thread per note. Include borrower status.

■ PRO TIP

Running multiple strategies? Use Claude Projects or separate ChatGPT Custom GPTs — one per strategy. Switch contexts by switching projects.

■ NEW What Order to Do It In

The sequence matters — here's why

#	Step	Analogy	Why this comes first	What breaks if you skip it
1	Custom Instructions	<i>Job description</i>	Sets behavior FIRST — everything else is built on this foundation	AI responds generically. Memory gets stored but doesn't influence tone or priorities.
2	Memory	<i>The files</i>	Give it the facts about your business once behavior is established	AI has your data but doesn't know what to do with it. Surfaces irrelevant info.
3	Conversation Threads	<i>The desk</i>	Create focused workspaces once behavior and context are loaded	Threads feel generic. You lose compounding value of focused context.
4	Flow Engineering	<i>Performance coaching</i>	Advanced layer — only works well once the first three are solid	Premature optimization. You're tuning an engine before it's assembled.

■ NEW Test Your Configuration

Run these 3 prompts after setup

These prompts reveal whether your AI is actually behaving the way you configured it — before you start relying on it for real decisions.

<p>Test 1 Identity & Tone</p>	<p><i>"Introduce yourself. Who are you, what's your job, and how do you think?"</i></p> <p>Look for: Does it use the name you gave it? Does tone match your instructions? Does it reference your decision framework? If it sounds generic, your Custom Instructions didn't take — recheck where you saved them.</p>
<p>Test 2 Memory & Context</p>	<p><i>"What do you know about my business and my investing goals right now?"</i></p> <p>Look for: Should accurately reflect what you stored — strategy, market focus, goals, preferences. If blank or wrong, update your memory or Project instructions.</p>
<p>Test 3 Decision Making</p>	<p><i>"I'm looking at a 3BR SFR, \$280k purchase, \$2,100/mo rent, taxes/insurance ~\$400/mo. Give me your quick take."</i></p> <p>Look for: Does it apply your decision framework? Use your output format? Feel like your advisor or a generic chatbot? If generic — your framework and output preferences need more specificity.</p>

Passed all 3? Your configuration is working. Move on to building threads and start using it on real decisions.

Failed one or more? Go back to that layer. Most common fix: instructions weren't saved in the right place, or they're too vague. Be more specific.

■ START HERE Quick Start — Do This Today

30–45 minutes. Fully operational by the end.

Step 1

10–15 min

Set Up Custom Instructions

ChatGPT: Settings → Personalization → Custom Instructions

Claude: Settings → Profile → "What would you like Claude to know?"

Gemini: Create a Gem with your investor profile

Use the 5 components: Identity, Communication Style, Decision Framework, Output Preferences, Behavioral Rules.

Step 2

5–10 min

Add 5–10 Key Memories

Your current deal pipeline or portfolio

Your target market and asset class

Your top 3 business goals right now

How you prefer to receive information

Key relationships the AI should know about

Step 3

5 min

Create 3 Core Threads

Deals — for active acquisitions and underwriting

Strategy — for big decisions and market analysis

Operations — for day-to-day execution

Stay strictly on topic inside each thread.

Step 4

Daily

Use It Every Day

Ask for decisions: "What should I prioritize today?"

Ask for plans: "Help me map out this week's actions"

Ask for analysis: "Here's a deal — what am I missing?"

The first week is calibration. It gets sharper every session.

Most investors use AI like Google.

Ask a question, get an answer, close the tab.

You're building something fundamentally different.

A system that thinks with you, learns your business over time,
and helps you move faster than everyone else in the room.

*Whether your AI is named Maverick, or something entirely your own —
it becomes as good as you make it.*

thenorrisgroup.com · White Feather AI



DATE	TIME	LOCATION	TICKET
June 13, 2026	7 AM – 5 PM	Ontario Convention Center Ontario, California	\$595 / person

✓ Full-day access to all sessions & workshops	✓ Live AI tool demos & deal analysis	✓ Guided investment roadmap workshop	✓ Networking with speakers & investors
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