

# THE 20 MUST-ANSWER QUESTIONS FOR YOUR JOURNEY TOWARD INVESTING PEACE OF MIND<sup>®</sup>

- 1. Have you discovered your True Purpose for Money<sup>™</sup>, that which is more important than money itself?**  
 YES  NO •Discovering Your True Purpose for Money<sup>™</sup>
- 2. Are you invested in the Market?**  
 YES  NO •Portfolio MRI<sup>®</sup>  
•Choosing Your Investment Philosophy
- 3. Do you know how markets work?**  
 YES  NO •Understanding the Dimensions of Risk & Return
- 4. Have you defined your Investment Philosophy?**  
 YES  NO •Choosing Your Investment Philosophy  
•Discovering Your True Purpose for Money<sup>™</sup>
- 5. Have you identified your personal risk tolerance?**  
 YES  NO •Portfolio MRI<sup>®</sup>
- 6. Do you know how to measure diversification in your portfolio?**  
 YES  NO •Separating Myths: The Story of Investing  
•Understanding the Dimensions of Risk & Return  
•Portfolio MRI<sup>®</sup> Correlation Matrix
- 7. Do you consistently and predictably achieve market returns?**  
 YES  NO •Understanding the Dimensions of Risk & Return  
•The Investment Vortex  
•Portfolio MRI<sup>®</sup>
- 8. Have you measured the total amount of commissions and costs in your portfolio?**  
 YES  NO •Portfolio MRI<sup>®</sup>  
•Cost Analysis
- 9. Do you know where you fall on the Markowitz Efficient Frontier?**  
 YES  NO •Portfolio MRI<sup>®</sup>  
•Separating Myths: The Story of Investing
- 10. When it comes to building your investment portfolio, do you know exactly what you are doing and why?**  
 YES  NO •The Investor Coaching Series

**11. Are you working with a financial coach versus a financial planner?**

YES  NO •The Investor Inventory

**12. Do you have a customized lifelong game plan to guide all of your investing and spending decisions?**

YES  NO •Discovering Your True Purpose for Money™  
•Choosing Your Investment Philosophy  
•Future View

**13. Do you have an Investment Policy Statement?**

YES  NO •Matson Money Client Account Application

**14. Have you devised a clear-cut method for measuring the success or failure of your portfolio?**

YES  NO •The Investment Vortex

**15. Do you fully understand the implications and applications of diversification in your portfolio?**

YES  NO •The Investment Vortex  
•Portfolio MRI®

**16. Do you have a system to measure portfolio volatility?**

YES  NO •Portfolio MRI® Standard Deviation

**17. Are you aware of the costs associated with purchasing commission-based products?**

YES  NO •Costs: The Dark Side of Investing  
•Portfolio MRI®  
•Cost Analysis

**18. Do you know the three warning signs that you may be speculating with your money versus prudently investing it?**

YES  NO •Separating Myths: The Story of Investing

**19. Can you identify the cultural messages and personal mind-sets about money that destroy your investing peace of mind?**

YES  NO •Defeating Your Money Demons

**20. Are you ready to shift your personal experience of money and investing from a scarcity mode to an abundance mode – where you can live your life rather than obsess about your assets?**

YES  NO •The Investor Inventory

*When you have achieved the ability to answer “yes” to all of these questions, you will be on your way to a high level of investing peace of mind.*

All investing involves risks and costs. No investment strategy (including asset allocation and diversification strategies) can ensure peace of mind, guarantee profit, or protect against loss.