

## The 20 Must-Answer Questions For Your Journey Toward Investing Peace Of Mind<sup>®</sup>

- 1** Have you discovered your True Purpose for Money, that which is more important than money itself?

**YES**                       **NO**
- 2** Are you aware of all the mental biases and blind spots you will likely face as an investor?

**YES**                       **NO**
- 3** Are you invested in the market?

**YES**                       **NO**
- 4** Do you know the three warning signs that you may be speculating with your money versus prudently investing it?

**YES**                       **NO**
- 5** Do you have an academic understanding of how markets work?

**YES**                       **NO**
- 6** Have you defined your investment philosophy?

**YES**                       **NO**
- 7** Do you consistently and predictably achieve market returns?

**YES**                       **NO**
- 8** When it comes to building your investment portfolio, do you know exactly what you are doing and why at all times?

**YES**                       **NO**
- 9** Do you have a system to academically measure portfolio volatility?

**YES**                       **NO**
- 10** Do you have an academic method for measuring your risk tolerance and do you know what that number is?

**YES**                       **NO**



20 Must-Answer Questions

- 11** Have you measured the quality and maturities of the fixed income in your portfolio?
- YES**                       **NO**
- 12** Do you know where you fall on the Markowitz Efficient Frontier, or how far under it you are?
- YES**                       **NO**
- 13** Are you working with a financial coach versus a financial planner?
- YES**                       **NO**
- 14** Do you have an algorithm and proven process for rebalancing your portfolio?
- YES**                       **NO**
- 15** Have you measured the total amount of commissions and costs in your portfolio?
- YES**                       **NO**
- 16** Do you fully understand the implications and applications of diversification in your portfolio?
- YES**                       **NO**
- 17** Do you have an Investment Policy Statement?
- YES**                       **NO**
- 18** Have you devised a clear-cut method for measuring the success or failure of your portfolio?
- YES**                       **NO**
- 19** Can you identify the cultural messages and personal mind sets about money that destroy your investing peace of mind?
- YES**                       **NO**
- 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**

**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.*

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