

## THE 20 MUST-ANSWER PORTFOLIO QUESTIONS

for your journey toward peace of mind

1. Have you discovered your True Purpose for Money, that which is more important than money itself?  YES  NO
2. Are you invested in the Market?  YES  NO
3. Do you know how markets work?  YES  NO
4. Have you defined your Investment Philosophy?  YES  NO
5. Have you identified your personal risk tolerance?  YES  NO
6. Do you know how to measure diversification in your portfolio?  YES  NO
7. Do you consistently and predictably achieve market returns?  YES  NO
8. Have you measured the total amount of commissions and costs in your portfolio?  YES  NO
9. Do you know where you fall on the Markowitz Efficient Frontier?  YES  NO
10. When it comes to building your investment portfolio, do you know exactly what you are doing and why?  YES  NO

11. Are you working with a financial coach versus a “financial planner”?  YES  NO
12. Do you have a customized lifelong game plan to guide all of your investing and spending decisions?  YES  NO
13. Do you have an Investment Policy Statement?  YES  NO
14. Have you devised a clear-cut method for measuring the success or failure of your portfolio?  YES  NO
15. Do you fully understand the implications and applications of diversification in your portfolio?  YES  NO
16. Do you have a system to measure portfolio volatility?  YES  NO
17. Are you aware of the incentives brokerage firms and the financial community have when selling commission based products?  YES  NO
18. Do you know the three warning signs that you are gambling and speculating with your money versus prudently investing it?  YES  NO
19. Can you identify the cultural messages and personal mind-sets about money that destroy your 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?  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 peace of mind.**