

# 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
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 costs associated with purchasing commission-based products?**  
 YES  NO
- 18. Do you know the three warning signs that you may be 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 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.