

# THE 20 MUST-ANSWER 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

• [Discovering Your True Purpose for Money](#)

2. Are you invested in the Market?

YES  NO

• [The Free Market Investment Analysis](#)  
• [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](#)

5. Have you identified your personal risk tolerance?

YES  NO

• [The Free Market Investment Analysis](#)

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](#)  
• [The Free Market Investment Analysis](#)

7. Do you consistently and predictably achieve market returns?

YES  NO

• [Understanding the Dimensions of Risk & Return](#)  
• [The Investment Vortex](#)

8. Have you measured the total amount of commissions and costs in your portfolio?

YES  NO

• [The Free Market Investment Analysis](#)

9. Do you know where you fall on the Markowitz Efficient Frontier?

YES  NO

• [The Free Market Investment Analysis](#)  
• [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

• [Customizing Your Lifelong Game Plan](#)

13. Do you have an Investment Policy Statement?

YES  NO

• [The Free Market Investment Analysis](#)

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](#)  
• [The Free Market Investment Analysis](#)

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

YES  NO

• [The Free Market Investment Analysis](#)

17. Are you aware of the incentives brokerage firms and the financial community have when selling commission-based products?

YES  NO

• [Costs: The Dark Side of Investing](#)  
• [The Free Market Investment Analysis](#)

18. Do you know the three warning signs that you are gambling and 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 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?

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 peace of mind.**