

# The Twenty MUST-ANSWER Questions For Creating Lasting 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 defined 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 beat the market?

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's 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 seeking 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 all the illusions propagated by the brokerage and financial community to sell 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-set 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 have mastered and obtained a high level of peace of mind.**

**SCORING: Give yourself 5 points for every "YES" answer.**

**90-100: You are a Conscious Investor! Congratulations!** This is quite an achievement. You are someone who understands what it means to have peace of mind about your long-term investments. As a Conscious Investor, you have undoubtedly developed a relationship with a qualified Financial Advisor based on common world views and trust. Maintaining this relationship is crucial and will require mutual commitment and dedication. As a unique investor in the world today, you are encouraged to share your success with others.

**70-85: Preconscious** means "that part of a person's mental activity which is not immediately aware, but which can be easily accessed." Give yourself a pat on the back for having reached this level!! You are one of the rare individuals who has asked the right questions and paid attention to what is important, and yet, so much more is available to you. Be sure to talk to with a qualified Financial Advisor and complete the process of Being A Conscious Investor!

**50-65: Semiconscious** describes your state of awareness with regard to your investment decisions. You have a partial sense of the impact these kinds of financial choices can have in the quality of your life. You have started on the path of this fascinating journey, however, you still have some work to do. Take the time to meet with a qualified Financial Advisor and find out the answers to your questions.

**45 and below: Unconscious** about investments. Schedule an appointment immediately with a qualified Financial Advisor. Don't remain in the dark about your long-term investment picture. An Advisor can help you find the answers to these questions.

*Actions I will take to raise my level of consciousness about money:*

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