

## The 20 Must-Answer Questions For Your Journey Toward Investing Confidence

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

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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 confidence?  
 Yes    No
20. Are you ready to shift your personal experience with 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 confidence.**