



1. What is your true purpose in life?
2. What is the statistical probability of your financial success?
3. Are you being sold or guided to your financial decisions?
4. What does your personal risk tolerance mean?
5. Does your portfolio exemplify your personal risk tolerance?
6. How diversified is your portfolio?
7. Is your portfolio built on academic principles?
8. What drives your financial decisions?
Do you have a philosophy?
9. Do you know whether you're on or off track for financial success?
10. Do you understand the probable volatility of your portfolio in the future?
11. Do you understand the importance of independence in the advice you receive?
12. Do you understand how you would build a prudent investment philosophy?
13. Can you identify the three things that lead to speculation in your portfolio?
14. How do markets work?
15. Do you have the four pillars for financial success in retirement?
16. Do you know when it's appropriate for you to retire?
17. Is your portfolio constructed on conventional theory or evidence-based principals?
18. Are you ready for the truth?