

QUESTIONS ABOUT INVESTING

1. What is your investment philosophy?
2. What is your investment strategy?
3. What results have you had with your investments over the past few years?
4. How have you measured your results?
5. To what extent have you relied on the advice of others regarding your investments?
6. What would you have done differently regarding your investments?
7. What role does diversification play in your investment planning?
8. What types of investments do you prefer?
9. How much time do you want to spend selecting and managing your investments?
10. What is your exit strategy from your investments?