

Appendix A5: Expert Investing Readiness Self-Assessment

Advanced Tool	I understand it	Have tested it	I know how to use it
Options (covered calls/puts)	Y/N	Y/N	Y/N
Tactical Asset Allocation	Y/N	Y/N	Y/N
Private Equity / Deals	Y/N	Y/N	Y/N
Margin / Leverage	Y/N	Y/N	Y/N

Appendix A6: Lifestyle & Fulfillment Scorecard

Life Area	Current Rating (1 - 5)	Notes or Next Action
Work/Life Balance		
Stress Management		
Enjoyment of Golf		
Confidence in Finances		
Alignment with Values		
Time with Family/Friends		