



**CORNERSTONE**  
WEALTH MANAGEMENT, INC.

## 60-Second Financial Audit for your Investment Portfolio

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**The following questions will help you discern the reliability of your current investment strategy and the effectiveness of your key advisors.**

Yes No

Do you have a written Investment Policy Statement (IPS) created by your advisor to articulate and execute your overall investment strategy?

[ ] [ ]

Do you know what investments you own, why you own them, and what they are doing for you?

[ ] [ ]

Do you understand exactly how, when and why changes are made in your investment portfolio?

[ ] [ ]

Do you know the degree of risk, target return, and the total costs of managing your portfolio?

[ ] [ ]

Has your portfolio delivered the results you seek within your comfort level?

[ ] [ ]

Does your portfolio include real estate or other alternative investments?

[ ] [ ]

Do you believe your investment expectations are reasonable and consistently achievable?

[ ] [ ]

Do you feel confident that your current strategy will achieve your financial goals?

[ ] [ ]

Does your current advisor actively and consistently demonstrate A-level management expertise?

[ ] [ ]

Do you understand how your current custodian or advisor gets paid, and do they serve in a fiduciary capacity for your accounts?

[ ] [ ]

Does your advisor hold a CERTIFIED FINANCIAL PLANNER™ designation in addition to other planning-based credentials and designations?

[ ] [ ]

If you answered [No] to any of these questions, you could potentially experience a less-than-optimal investment experience. It might be time for a second opinion. For a complimentary investment review, contact Cornerstone Wealth Management at 925.824-2880 or [info@cornerstonewmi.com](mailto:info@cornerstonewmi.com).

*Planning To Be Our Clients' Most Valued Asset™*