In an effort to ensure you are engaging with and digesting the articles you will be reading and reviewing prior to your time with us, we'd like you to prepare one of each of the following types of deliverables for each of the readings – please see below:

Type One (15)

- Deliverable: answer each of the following two questions (short answers! A couple sentences max – we are not expecting essays ☺)
  - What did you learn from this assignment?
  - What are your questions pertaining to this assignment?
- Readings (attached or embedded via link):
  - Articles:
    - 1990 – To Think Like a CFP®
    - 2000 – To Feel Like a CFP®
    - 2009 – To Act Like a CFP®
    - 2012 – To Learn Like a CFP®
    - 2010 – Finding the Planning in Financial Planning
    - 2014 – Policy-Based Financial Planning as Decision Architecture
  - TheLiveBigWay® Digest Posts
    - How to Build an All-Weather Portfolio
    - China Syndrome posts (2011 and 2016) and then Worldviews post
    - An Investment Approach that's Stable, not Static

- What does it mean to Live Big® in these trying times?
- Yeske Buie's Financial Literacy Program
- Chaotic Systems (or why the markets are like the weather)
- A Different Dimension
- Yeske Buie Playbook

▪ Other

- A Proper Apology

- **Type Two (2)**

  o Deliverable: please answer each of the questions on the attached worksheet (titled: 8 Questions for Reviewing Articles) for each of the two articles

  o Readings:

  ▪ 2006 – Decision Rules and SWR Rate

  ▪ 2008 – Opportunistic Rebalancing