

10 QUESTIONS TO ASK WHEN CHOOSING A FINANCIAL ADVISOR

1. What experience do you have?
2. What are your qualifications?
3. What services do you offer?
4. What is your approach to financial planning?
5. What types of clients do you typically work with?
6. Will you be the only financial planner working with me?
7. How will I pay for your financial planning services?
8. How much do you typically charge?
9. Do others stand to gain from the financial advice you give me?
10. Have you ever been publicly disciplined for any unlawful or unethical actions in your professional career?

Source: Certified Financial Planner Board Of Standards, Inc. letsmakeaplan.org

