

HOW TO FIND THE BEST FINANCIAL ADVISOR FOR YOU

You're not just looking for a financial advisor, you're looking for the best financial advisor for you. It's important that you work with someone you trust, who understands your financial situation and goals, and who can provide sound advice as you navigate complicated financial decisions.

Before committing to who will help you plan your financial future, use this checklist to evaluate whether or not you've found the best financial advisor for you.

	Yes	I am unsure	Not at all
REFERRAL SOURCE: The advisor was introduced to me by someone I respect financially, or I trust the advisor based on ratings and reviews.			
SERVICES: I know of all the services the financial advisor provides and whether or not they align to what I need.			
PROCESS: I have a clear understanding of the advisor's approach, how they plan to communicate with me, and what it will be like to work with them.			
EXPERIENCE: The advisor specializes or has frequently worked with clients with similar financial needs to mine.			
FEES: I understand why, how, and how much the financial advisor will be paid.			
PHILOSOPHY: I understand and feel comfortable with the financial advisor's investment philosophy.			
GOALS: The financial advisor has communicated a clear understanding of my financial situation and short and long term goals.			
ADVICE: The financial advisor gives thoughtful, informed, clear advice, and rather than simply taking orders from clients.			
DIRECTNESS: During emotionally-charged financial decisions, the financial advisor will give me the advice I <i>need</i> to hear, even if it isn't what I <i>want</i> to hear.			
CELL PHONE TEST: I <i>like</i> the financial advisor enough that I'm OK with them calling me on my cell phone intermittently for the next few decades.			
MARKET CRASH TEST: I trust the financial advisor enough to help me navigate inevitable market downturns.			

