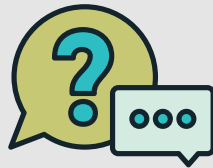


# CHOOSING A FINANCIAL ADVISOR

Finding a financial advisor is one of the most important searches that you will undertake in your financial life. The right advisor can make a significant difference in your likelihood of reaching your financial goals as they will guide you towards the correct decisions before and during retirement. Follow our 9 important steps to help you find the advisor that is right for your situation.



LOOK FOR ADVISORS WHO HAVE THE HIGHEST FIDUCIARY ACCREDITATION (CFP, CERTIFIED FINANCIAL PLANNER)



INTERVIEW 2-3 ADVISORS AFTER NARROWING THE ADVISOR CHOICES FROM SEVERAL IN YOUR AREA



FIND OUT IF THE ADVISOR WORKS WITH SIMILAR CLIENTS TO YOUR AGE AND FINANCIAL SITUATION



REVIEW THE FIRM'S ADV FORM ON FNRA AS WELL AS THE ADVISOR'S INFORMATION



GET AN EXAMPLE OF THEIR CLIENT REPORTS TO SEE IF THE INFORMATION AND FORMAT IS WHAT YOU NEED



UNDERSTAND HOW THE ADVISOR IS PAID SO YOU KNOW HOW THEY WILL MAKE DECISIONS



MAKE SURE THE FIRM OFFERS THE TOOLS AND TECHNOLOGY YOU DESIRE



UNDERSTAND WHAT IS OFFERED FOR THE FEE YOU ARE PAYING AND IF YOU NEED ADDITIONAL SERVICES



PERFORM DUE DILIGENCE ON THE FIRM AND ADVISOR BY FOLLOWING UP WITH ANY CLIENT REFERRALS OFFERED