BUILD YOUR FINANCIAL DREAM TEAM



Why You Need a Team

- Increase your knowledge
- Ensure receiving correct advice



What to Add First

- Significant other
- Solid financial institution
- Insurance professional
- Realtor and mortgage loan officer



Who are the Specialists

- Financial advisor
- Attorney
- Accountant



How to Choose Team

- Interview 2 – 3
- Expertise with your situation
- Connection and comfort

smarter MONEY LIFE
POWERED BY FORUM CREDIT UNION

FORUM CREDIT UNION