

## Financial Advisor Questionnaire

### How to Choose the Right Financial Advisor for Your Needs?

Finding the right financial advisor is extremely important as your choice will affect your financial future. It is always beneficial to seek the advice of a qualified financial advisor to guide you in reaching your financial goals. Below are 10 questions to ask several financial advisors, to help you in choosing one.

### 10 Questions to Ask Your Financial Advisor

<b>QUESTION 1</b>	<p><b>What is Your Advising Style?</b></p> <p>This will expose the type of interpersonal style the advisor uses. Styles could be conversational, methodical, strategic or relationship focused. Some clients are not looking for their financial advisor to be their friend and may prefer a direct and formal process.</p>
<b>QUESTION 2</b>	<p><b>What is Your Specialty? Why Did You Choose That?</b></p> <p>This will help you discover if the advisor has a natural interest related to solving your problems and helping you reach your specific goals.</p>
<b>QUESTION 3</b>	<p><b>Tell Me About Your Education and Professional Accreditation?</b></p> <p>This will help you understand how important it is for the advisor to stay current.</p>
<b>QUESTION 4</b>	<p><b>Please Tell Me About Your Team and What They Do in the Process? What are Their Qualifications.</b></p> <p>Often you will be dealing with your financial advisors' team and it's important to know their level of skill and experience.</p>
<b>QUESTION 5</b>	<p><b>What is Your Favourite Part of Your Work?</b></p> <p>This will help you understand how the financial advisor is naturally motivated to invest his or her time and attention.</p>
<b>QUESTION 6</b>	<p><b>What Kind of Person is Your Favourite Client?</b></p> <p>This will also help you understand if the advisor will potentially enjoy working with you.</p>
<b>QUESTION 7</b>	<p><b>What is Your Experience Working With Other Professional Advisors in a Multi-Disciplined Team?</b></p> <p>Often retirement, tax and estate planning requires working in a team of multi-disciplined advisors to get the optimum results. Some financial advisors do not have this sort of experience and may find this sort of collaboration uncomfortable.</p>

<p><b>QUESTION 8</b></p>	<p><b>What is Your Philosophy About Money? What Does Money Mean to You?</b> This is important to discover how the advisor handles his or her own relationship with money and whether your philosophy about money is mutually aligned.</p>
<p><b>QUESTION 9</b></p>	<p><b>What Does Success Look Like for Your Typical Client? How Do You Know You Have Been Successful?</b> This is important to discover so you can get an example of what the financial advisor sees as important elements of a successful professional relationship.</p>
<p><b>QUESTION 10</b></p>	<p><b>What are Your Criteria for Assessing Whether You Should Be Working with a Particular Client or Not?</b> It is important to be able to have clear and honest communications. Can the advisor have difficult conversations that may be required to keep his or her clients on the right track?</p>
	<p><i>The above 10 questions will help you interview and evaluate financial advisors to find a competent, qualified professional with whom you feel comfortable and whose advising style suits your needs.</i></p>

## Financial Advisor for Business Owners

For over 30 years, Keith Brown has worked with hundreds of private corporations, self-employed individuals and family enterprises to help them prepare for their futures and ensure business continuity. Keith Brown has fine-tuned a process that enables clients for the unique challenges faced by business owners. Securing the future of you, your family, your employees and your partners is our highest priority.

## Call Us to Learn More About Financial Advisor Services

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