Understanding What A Professional Can Do

An investment advisor is someone who will assist you on your path to financial discovery by listening to your unique situation, asking questions, and building a financial road map to keep you on track. Financial planning will provide you with goal setting, education, and guidance through financial investments and jargon.

How do you find an investment advisor?

- Ask a family member or friend for a referral.
- Look in the Yellow Pages for banks, insurance companies, independent mutual fund dealers.

What to bring to your first investment advisor meeting to best develop your financial road map:

1. Investment Statements
2. Tax Returns
3. Insurance Policies, and
4. Related Documents

A few questions to ask your investment advisor are:

1. What type of services do you provide?
2. How do you get paid?
3. What type of people make up the majority of your clients?
4. What is your background and what are your designations?

For more information on the services offed by a investment advisor, visit our website by clicking the link below or discover us through our social media accounts. We have included a *FREE* estate planning check-list below for your convenience to plan and prepare for your estate.

If you have any further questions, please do not hesitate to reach out.

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