



Here are the Top 7 Questions to Ask a Financial Advisor

1. Are You a Fiduciary (100% of the time)?
2. What is Your Specialty (and Number of Clients)?
3. What is the Total Cost to Work With You?
4. What Is Your Experience With Complex Financial Planning?
5. What Services Do You Provide?
6. Where Do You (Safely) Hold My Money?
7. What Is Your Investment Philosophy?