Finding the Right Financial Advisor

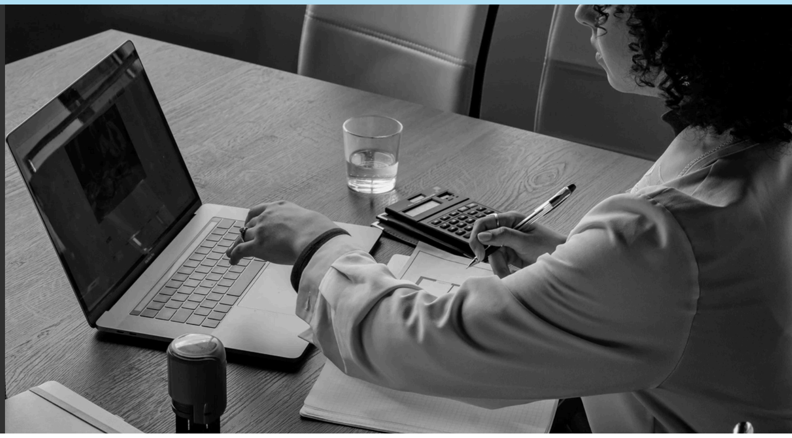
Finding the right advisor to help you achieve your financial goals can be a daunting task, but it is an important decision that can have a significant and positive impact in your life. A Financial Advisor can help you set and achieve goals, simplify your financial affairs, manage your investment portfolio, increase your financial knowledge, protect your family and act as an accountability partner to keep you on track to living your best life. So where do you start?

There are many different firms, with many different Advisors, all offering financial advice to clients. It's important to do your research to ensure both the firm you select and the specific Advisor you work with are a fit for you personally and can meet your specific needs. Asking your friends, family members and colleagues for suggestions is a good place to start, as is asking your accountant or other trusted professional who they would recommend or have heard good things about.

Once you have a few names, you can do an online search to explore their websites and social media profiles to see if the services they offer and the image they project looks appealing to explore further. You can see if the firm the advisor works at is a member of the Canadian Investor Protection Fund to help protect yourself in the event the firm becomes insolvent, and you can pull an Advisor Report from the Canadian Investment Regulatory Organization to see if there have been any regulatory disclosures or disciplinary actions related to a specific advisor.

Now that you have narrowed down the list of potential Advisors to work with, it's a good idea to interview at least three different Advisors to compare services and styles (personality & approach) before selecting the right advisor for you. To help with the interview process, here are the top 10 questions to ask:

10 Questions to Ask a Financial Advisor



1	**What types of clients do you typically work with and is there a minimum account size?**
2	**How many clients do you work with?**
3	**How many people on your team and do you work with other professionals?**
4	**What services do you offer?**
5	**What do you charge?**
6	**What experience/credentials do you have?**
7	**What is your investment philosophy?**
8	**What types of investments do you offer?**
9	**How often do you communicate with your clients and in what format?**
10	**How do you define a successful client/advisor relationship?**

Watch this short video to learn more and check out The Wealthy Life Club to gain access to all the resources you need to make smart financial decisions and live your version of The Wealthy Life.

Have a question or a topic you'd like to see us cover on The Wealthy Life? Send a message to info@thewealthylife.com.