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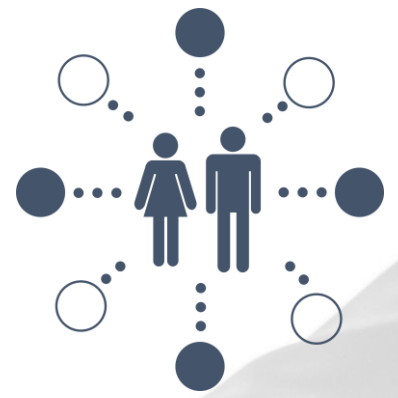
# 6 Questions to Ask an Advisor in the First Meeting



## What can I expect if I hire you?

Little can get in the way of a successful partnership when expectations are discussed up front. If you have certain expectations, make them clear. Are you looking to break away from your current advisor? Explain why it's not working out and what needs to improve for you to justify making the switch.

# What services do you offer?



It's best to ask yourself what you're actually looking for before you ask this question, so you can see if it matches up with what's offered.

Many advisors claim to provide "comprehensive" or "holistic" planning. Dig deeper into what that means, both in terms of specific services and how they charge.



# Can you handle the complexity of my finances?

In football terms, the advisor can be seen as the quarterback of your financial planning team. Learn more about the resources and experts they utilize in meeting your comprehensive needs.



# What are my all-in costs?

It's a good sign when an advisor itemizes fees, expenses, warts and all. It paints a picture of reality and let's the advisor illustrate how they work to minimize these costs. On the flip side, those who shy away from the cost discussion can create inflated expectations and set you up for disappointment.



# How do you evaluate my investment performance?

Most advisors use benchmarks, or a blend of different market indicators, as a means to evaluate the risks and performance of a portfolio. These benchmarks can differ significantly depending on the type of investor you are; instead of touting past performance, the advisor should be trying to understand your investment needs within the overall context of your plan.

# How do you handle taxes?



Taxes play a critical role in every facet of your financial life. Your advisor may not be permitted to provide specific tax advice, but they should be talking to you about your taxes on a regular basis and factoring them into the advice they do provide.

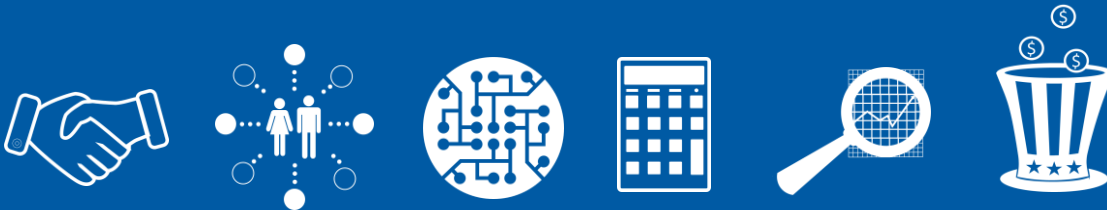
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