SixPoint
Financial Partners

Questions That You Should Be Asking Your Financial Professional:

- How long have you been a financial professional?

- How long do you plan to be in this business?

- What licenses, certifications and credentials do you have?

- What is your area of focus?

- Who is your ideal client?

- What companies do you represent, and do you have an incentive to recommend one over another?

- What is your process?

- How frequently can I expect to hear from you, and will you be the only person working with me?

- What happens to my accounts if something happens to you?

- How do you get paid and are there any fees?

Notes:

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