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REASONS

WHY YOU SHOULD
WORK WITH A

CFP[®]

PROFESSIONAL



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1 Not every financial professional is a fiduciary, meaning they are legally required to put your best interests first. A CFP[®] professional legally has to put your interests first when providing your financial planning advice.

2 Have you checked what type of education your financial professional has? A CERTIFIED FINANCIAL PLANNER[™] professional has a college degree, a minimum of 3 years of financial planning experience and has taken an extensive exam requiring years of preparation.

3 A CERTIFIED FINANCIAL PLANNER[™] professional has spent thousands of dollars and hundreds of hours making sure they are the best professional they can be. Why would you work with anyone else?

4 With financial information being so readily available, wouldn't it be nice to work with someone who knows the good advice from the bad? A CERTIFIED FINANCIAL PLANNER[™] professional has spent time analyzing this data to determine what might be best for you.

5 When you're searching for a financial planner or advisor, knowing that they have a professional designation specifically relating to the area you're asking for guidance on can bring a sense of confidence in their abilities.

6 The CFP[®] designation is viewed by the financial planning profession as the best designation to hold. It's in your best interest to work with the best financial professional you can find.

7 Working with an insurance salesman will have you leaving their office with an insurance product. Working with a CERTIFIED FINANCIAL PLANNER[™] professional will have you leaving their office with a customized plan for your situation.

8 The CFP Board, which awards the CERTIFIED FINANCIAL PLANNER[™] designation, has the power to revoke the designation from a planner. They field consumer complaints on their members to ensure they are still worthy of using the designation. When your advisor says they are the best fit for you, is it just their word or a national board backing them up on that claim?

9 The financial world is continually changing. A CERTIFIED FINANCIAL PLANNER[™] professional has to continually take classes to keep up with these changes and keep their designation. Having a professional with a continually updated body of knowledge is essential to keep your finances up-to-date.

10 A CERTIFIED FINANCIAL PLANNER[™] professional is not just trained to provide impartial advice on investments, but also on income taxation, retirement planning, employee benefits, estate planning, insurance, debt management and everyday finances. No question is too big or small.

This brief guide was created to give you confidence in choosing your next financial professional. If you have any questions, please call the number to the left. It would be a pleasure to speak with you.