

DITCH THE SUITS



GET MORE FROM YOUR MONEY AND LIFE!

@ditchthesuits



What if we told you the financial services industry is primarily focused on creating fear for investors? *They [financial advisors] are trying to get you to buy something they think you need.*

We want to help you recognize if you are dealing with a salesperson or a fiduciary. We are providing you questions you can ask your financial advisor.

- NO. 1** How exactly are you paid?
- NO. 2** Will you as the advisor have investment discretion?
- NO. 3** Who ultimately chooses the investments my money goes into?
- NO. 4** What happens if you are unavailable or if something happens to you?
- NO. 5** Who else gets paid?
- NO. 6** What is your investment selection process (in detail)?
- NO. 7** How often are the investments in my portfolio reviewed and how often is my account worked on?
- NO. 8** What is your investment review process?
- NO. 9** What is your account review process?
- NO. 10** Do all of your clients have the same portfolio/investments?
- NO. 11** How do you manage the investment portfolios?
- NO. 12** How many accounts do you currently manage?
- NO. 13** Do you specialize in investing or in financial planning, and if both, how do you have time to handle both responsibilities?



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