SAGEVEST Wealth Management

An independent, fee-only financial advisory and wealth management firm, dedicated to

CONNECTING YOU WITH YOUR WEALTH

20 IMPORTANT QUESTIONS TO ASK A FINANCIAL ADVISOR

There's a lot at stake when you're hiring a financial advisor to guide your future financial decisions. To help you make the best choice, ask each advisor the same set of 20 questions:

1) Are you a fiduciary? Y ☐ N ☐ **2) Experience** ______________________

3) What are your credentials? CFP ☐ CFA ☐ CPA ☐ ChFC ☐ Other: ____________

4) Will I be working with you long-term? Y ☐ N ☐

5) How often will we communicate? ______________________

6) How many clients do you have? Firm: ____________ Advisor: ____________

7) Have you or your firm been subject to disciplinary or legal actions? Y ☐ N ☐

8) What are the fees? (Include how fees are calculated, fee cycle, and advisor's compensation)

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9) What services are included in the fee? ______________________

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10) Do you report investment performance net of fees? Y ☐ N ☐

11) What's your investment philosophy? ______________________

Diversification: Y ☐ N ☐ **Growth vs. Value:** Y ☐ N ☐ **Market Timing:** Y ☐ N ☐

Types Of Investments: ______________________

12) How will you determine my asset allocation? ______________________

13) Will I have to sell everything I own, even if there's a tax impact? Y ☐ N ☐

14) How often will my investment accounts be reviewed and repositioned?

Monthly ☐ Quarterly ☐ Annually ☐ Other ______________________

15) Where will my assets be held? ______________________

16) What's included in your financial planning services? ______________________

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17) Are there additional fees for financial planning? Y ☐ N ☐ $$$$ ____________

18) How often will my financial plan be updated? ______________________

19) Does planning software use an effective tax rate? Y ☐ N ☐

SageVest Wealth Management proudly serves as an independent, fee-only, fiduciary advisor to individuals, families and business owners who care about making smart wealth decisions with counsel they can trust. Please contact us to learn more about how we can help you secure your financial future.

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