



HOW TO FIND THE RIGHT MONEY MANAGER

12 Questions to Ask

Finding an advisor and asset manager you can trust and will be comfortable with for the long-term can be challenging, but it may be one of the most important decisions you will ever make for you and your family.

When interviewing any potential investment advisor, it's crucial to do your due diligence in order to determine who will be the best fit. However, it can be difficult to know what questions to ask. With this in mind, we designed the following list to help assist you in making your decision.

1. What separates your firm from others in the financial industry?
2. Can you describe your investment philosophy and how you manage risk?
3. What do you do, if anything, to help protect your clients during a bear market?
4. Can you walk me through your investment history and how you've performed in the past?
5. Who makes the investment decisions?
6. What if something happens to one of your key decision makers?
7. What is the background and experience of those who will be making investment decisions on my behalf?
8. Are you a fiduciary? What qualifies you to act as a fiduciary?
9. What would our relationship look like if I move forward with you?
10. What are your fees and how are you paid?
11. Where will my assets be held and are there any additional fees or costs associated with this?
12. How often will I hear from you and who do I call with questions?