

Video Script – 3 Questions To Ask Before Hiring a Financial Advisor

Hello, I am Tripp Boyer and this is David Ramey. We are Partners of the Boyer Ramey Wealth Management Group.

When it comes to your financial future, finding the right advisor is a major life decision that can impact the trajectory of your finances throughout your lifetime. Finding the right person can be challenging, but it's not impossible. That said we feel like there are three questions you should always ask.

Here are those 3 questions.

1. What are your credentials?

Our industry is full of different acronyms next to our names that mean different things. Most notably is the CFP designation which is also known as Certified Financial Planner. However, there are also a number of other credentials that imply areas of additional education. You'll want to ensure you are working with an advisor who's background aligns with your personal needs. So, don't be afraid to ask about their current credentials and follow up with "What does that mean"

2. How do you get paid?

Transparency of fees is really important within our practice. That said, I can't tell you how many prospective clients we meet who don't know how their existing advisor is compensated. Advisors can get paid in a multitude of ways – so make sure you ask. After all – you want to know how much you're paying – right?

3. How often will I hear from you?

I spoke to someone the other day who hadn't heard from their advisor in years. In our practice we believe in regular contact and scheduled meetings with our clients. We also host educational and fun events throughout the year. You'll want an advisor who is proactive with communication and easy to reach when you have a question. You deserve an advisor who makes you a priority.

We hope these three tips are helpful along your journey to find the right financial advisor. If you think we might be that company we'd love to have a conversation. Please give us a call or send us an email to schedule a convenient time.

Until next time.

- Disclosure added to video:

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