VALUE-ABILITY

Selecting a Trustworthy Advisor

In our personal and professional lives, we all need the advice and counsel of others. Finding trustworthy advisors can be difficult, costly, time consuming and frustrating if left to the “trial and error” method. Here are ten questions that can be used when interviewing potential advisors. Whether it is a financial advisor/planner, attorney, accountant, life coach or any other business or personal advisor, these questions are a great starting point.

1. **What are your most important values?**
2. **What do your clients say about you?**
3. **Provide me an example of doing what is best for a client?**
4. **What is an example of a time when you or your staff dealt with a mistake?**
5. **How do you deal with a difficult client?**
6. **Do you have a regular client contact process? If so, what is it? What outcomes can I expect?**
7. **What professional designations and licenses do you hold? What professional organizations do you belong to?**
8. **Can you explain what will happen during the process of coming your client?**
9. **What do you do to keep current with trends within your industry?**
10. **Can you please explain how you get paid?**