David Bromelkamp

From: David Bromelkamp
Sent: Monday, July 24, 2023 11:27 AM
To: dattomok@napfa.org
Cc: Kate Leibfried
Subject: AdvisorSmart wants your perspective on fee-only financial advice

Kathryn, I am writing a book titled ***AdvisorSmart® for the Individual Investor*** to help individuals to learn how to hire trusted financial advisors. The underlying theme is focused on finding objective financial advice from fee-only, fiduciary advisors. We have been blogging (https://advisorsmart.com/individual-investor-blog) ideas over the past 18 months for individual investors to help them to search for, find, select and retain a fee-only financial advisor. This month we started drafting the manuscript of our AdvisorSmart book with a fairly simple three-part outline:

1. Financial advice to avoid (financial product providers)
2. Financial advice to seek out (CFP® and NAPFA-Registered Financial Advisors)
3. How to search for, find, select and retain the right fee-only financial advisor

We want to tap into your expertise on this topic to provide some of your wisdom to help the individual investor. We are looking to quote experienced professionals like you to provide credibility for the various subjects addressed in the book. Based on your work experience, I think that you could have some great ideas on this subject. We are looking to include a quote from you as an expert in the field of financial advice to share your perspectives about how to help individual investors to find good financial advisors. Any quotes from you will need to be submitted to us via email by August 31st. Please let us know your thoughts by replying to this email (with one or two sentences) on any one or more (or all) of these questions:

1. How important is the ***CERTIFIED FINANCIAL PLANNER™ (CFP®)*** designation?
2. How important is a promise of a ***fiduciary standard of care*** when retaining a financial advisor?
3. Why is it important for an individual investor to work with a ***fee-only*** financial advisor?
4. What are the ***best tips*** you have for an individual investor about retaining a financial advisor?
5. How would you advise ***a friend or family member*** to select a financial advisor?

If you provide a one or two sentence response to a question, we will assume that we have your permission to include your quote in our AdvisorSmart blog posts and/or book.
Any insights that you can provide (on any of these questions) will be very much appreciated. Thank you in advance for your input and any ideas that you can provide.

Take care. DB

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