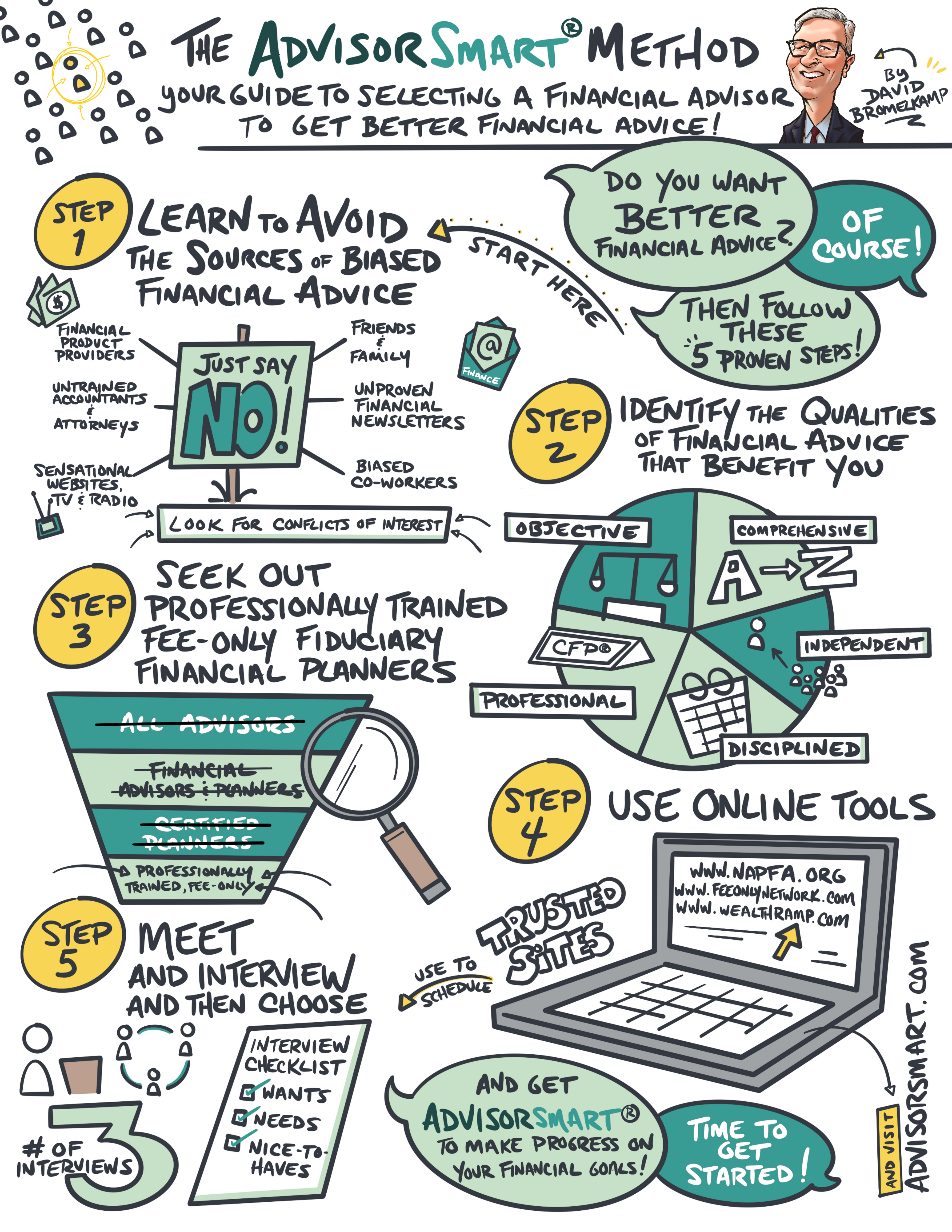
THE ADVISORSMART® METHOD
YOUR GUIDE TO SELECTING A FINANCIAL ADVISOR TO GET BETTER FINANCIAL ADVICE!
BY DAVID BROMELKAMP
DO YOU WANT BETTER FINANCIAL ADVICE?
OF COURSE!
THEN FOLLOW THESE 5 PROVEN STEPS!
START HERE
STEP 1
LEARN TO AVOID THE SOURCES OF BIASED FINANCIAL ADVICE
FINANCIAL PRODUCT PROVIDERS
UNTRAINED ACCOUNTANTS & ATTORNEYS
SENSATIONAL WEBSITES, TV & RADIO
JUST SAY NO!
FRIENDS & FAMILY
UNPROVEN FINANCIAL NEWSLETTERS
BIASED CO-WORKERS
FINANCE
LOOK FOR CONFLICTS OF INTEREST
STEP 2
IDENTIFY THE QUALITIES OF FINANCIAL ADVICE THAT BENEFIT YOU
OBJECTIVE
COMPREHENSIVE
A→Z
INDEPENDENT
CFP®
PROFESSIONAL
DISCIPLINED
STEP 3
SEEK OUT PROFESSIONALLY TRAINED FEE-ONLY FIDUCIARY FINANCIAL PLANNERS
~~ALL ADVISORS~~
~~FINANCIAL ADVISORS & PLANNERS~~
~~CERTIFIED PLANNERS~~
PROFESSIONALLY TRAINED, FEE-ONLY
STEP 4
USE ONLINE TOOLS
WWW.NAPFA.ORG
WWW.FEEONLYNETWORK.COM
WWW.WEALTHRAMP.COM
TRUSTED SITES
USE TO SCHEDULE
STEP 5
MEET AND INTERVIEW AND THEN CHOOSE
3
OF INTERVIEWS
INTERVIEW CHECKLIST
WANTS
NEEDS
NICE-TO-HAVES
AND GET ADVISORSMART® TO MAKE PROGRESS ON YOUR FINANCIAL GOALS!
TIME TO GET STARTED!
AND VISIT ADVISORSMART.COM