

## Financial Advisory Firm Selection Criteria

Before interviewing potential financial advisory firms, it would be wise to establish your financial advisory firm selection criteria. As interviewing financial advisory firms before clarifying your needs and wants would be inefficient, you may find it helpful to spend some time determining your unique requirements. Try investing some planning time to define your specific needs, wants, and “nice to haves” so you can narrow down the list of firms you will eventually include in your interview process. You can share this list of quantitative criteria with your significant other to identify financial firms that meet your shared requirements. You may use these quantitative financial advisory firm selection criteria to execute a “process of elimination” to reduce the number of interviews that you will need to schedule.

### Our Needs — We NEED the financial advisory firm to have these traits:

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### Our Wants — We WANT the financial advisory firm to have these traits:

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### Our “Nice to Haves” — It would be “NICE” for the financial advisory firm to have these traits:

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