Wealth Dimensions®
An Investment Advisory Firm

20 Questions to Ask Your Financial Advisor

1. What are your qualifications and credentials?

2. How are you compensated for your services?

3. What fees will I be expected to pay, and how do they impact my investments?

4. Can you explain your fiduciary duty to me?

5. What types of clients do you usually work with?

6. What other members of your team will I interact with?

7. Can you provide references from existing clients?

8. How will we communicate, and how often?

9. How do you create a personalized and adaptable financial plan for me?

10. How do you determine which investments are right for me?

11. How do you integrate different aspects of my financial life into a cohesive strategy?

12. How do you align investments with my long-term goals?

13. How will you monitor and evaluate my progress?

14. What are the tax implications of your investment strategies?

15. What is your approach to retirement planning?

16. How do you approach estate planning?

17. What's your succession plan for your practice?

18. What is your investment philosophy?

19. How do you handle market volatility?

20. How will you support me through major financial decisions?