

## 7 Steps to Find Your Ideal Financial Advisor

Step 1- Look for someone who is insurance friendly. It's always good to have multiple advisors with their various specialties. Any advisor that shuns insurance and thinks they can do better with your safe money than the insurance companies that have been doing it for more than 100 years probably doesn't have your best interest in mind.

Step 2- Along with #1 above, your advisor should be open to working with other advisors. Again, a team of advisors will take better care of you than someone flying solo.

Step 3- Find a planner that is interested in growing your nest egg. Some won't deal with client accounts under \$250,000. If that's you, don't feel bad. There are plenty of great advisors that work with us "beginners". J

Step 4- Don't be fooled by designations. The CFP designation is the "most significant" credential, and means that individual has passed a rigorous test, and maintains their education. It doesn't mean they're trustworthy or "expert" in anything. Find someone who is genuine, intelligent and cares about helping you.

Step 5- Ask for references. Better yet, ask your trusted friends for a referral instead. Chances are, if their advisor has done well with them, they'll do well with you.

Step 6- Choose someone who is willing to educate you. A good advisor doesn't keep you in the dark or rush to close you on the next great thing. Sure, they're the "expert" but you need to be educated and up to speed with the "why" behind your investment plan.

Step 7- Pick an advisor that is expert in your next desired area of investment. If it's real estate, a good Realtor can be golden, but so might a good property management firm. Take your time to make sure your resources are solid.