

DO YOU HAVE A

# GOOD FINANCIAL ADVISOR?

## READ THE FOLLOWING QUESTIONS

IF YOU ANSWER YES TO ALL THE QUESTIONS, YOU HAVE A KEEPER.

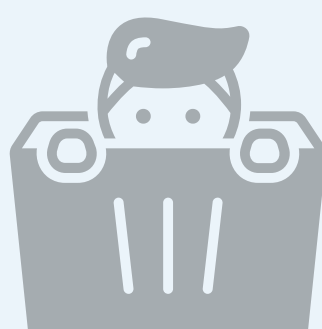
NO TO ANY OF THE QUESTIONS BELOW, ITS TIME TO LOOK AT OTHER OPTIONS



### QUESTION #1

Has your advisor explained to you how they get paid?

**QUESTION #2**  
Does your advisor proactively contact you, or do you have to chase them for answers?



### QUESTION #3

Does your advisor review you tax return annually?

**QUESTION #4**  
Is your portfolio invested tax-efficiently?



### QUESTION #5

Do you know when you will be able to retire?

**QUESTION #6**  
Do you know how much you will be able to spend in retirement?



**YES TO ALL? STAY THE COURSE**  
**EVEN ONE NO? TIME TO REVIEW YOUR OPTIONS**