

10 Essential Questions for Hiring a Planner

- Do you have any conflicts of interest?
Do you have to sell ANY amount of a product or company's product to maintain employment?
- Are you a fiduciary?
- How do you get paid?
- What licenses do you hold?
- How much time will I get with you?
- Do you only focus on investments or other facets of planning as well?
- What market specifically do you work with?
How much experience do you have with them?
- How do you decide investment philosophy?
- Taxes – talk about it.
- What makes you unique?