



**CHRISTIAN
FINANCIAL
ADVISORS**

21 QUESTIONS TO ASK A *financial advisor*



- How many years of experience do you have in the Financial Services industry as well as how long has the firm been in business?
- What is your educational background?
- What is your financial advice based on?
- How are you paid? Fee, commission, or both?
- How much do you charge on an annual basis to manage an investment portfolio?
- How much do you charge to do a Financial Plan or is it included with managing my investments?
- Do you have any potential conflicts of interest when giving me advice?
- Are you paid a commission for putting my money into anything?
- What kind of support team and staff do you have for servicing me?
- How do you manage investments and what is your written and ongoing strategy?
- Can you assure me I will not be investing in companies that support immoral activities and what is your strategy?
- What if something happened to you, or you were out on vacation or sick leave, who would serve me?
- How much money do you manage on behalf of your clients?
- Do you have a minimum for new clients or do you take on anyone regardless of their financial situation?
- Do you give advice on how to lower income taxes on an annual basis?
- How many clients do you personally serve?
- Will you work directly with my CPA to coordinate financial information as needed on an annual basis?
- How easily accessible are you when I have a financial question?
- What kind of safeguards do you have in place to protect my financial information?
- Will I have complete transparency to see all my accounts and their holdings online at any time?
- How often do you meet with your clients to go over their investment portfolio and update their financial plan?

