12 Smart Questions Everyone Should Ask A Financial Advisor

1. How long have you been practicing as an advisor?
2. What services do you provide?
3. What are your professional designations/qualifications?
4. What are your fees and how do you get paid?
5. What areas do you specialize in (retirement, business owners, newly separated)?
6. What is your investment/money philosophy?
7. How long have you been with this company or independent?
8. How will I know if you have my best interests in mind?
9. Who is your average client in terms of net-worth?
10. Do you have other clients like me?
11. May I contact a few clients you've worked with for at least 3 years?
12. How will our relationship work in terms of regular contact and follow-up to questions I may have?

Other Resources:

- What type of advisor do I need?
- What are the different types of advisors?
- What do all those acronyms mean in the advisor's title?