

# How Do You Find the Right One?

The financial world has changed dramatically over the last several years and many more dramatic changes are expected. With the complexities of retirement planning these days, how do you find the right financial advisor for you?

Choosing an advisor is one of the most important financial decisions that you will ever make. The person you decide to work with will be in a position to influence critical investment and planning decisions, and the quality of that advice could heavily influence your long-term financial success. Whether you are in retirement or preparing for retirement, planning an estate, selling a business or handling a wide range of complex financial matters, having the right advisor relationship in place is vital.

## Retirement & Estate Planning



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There are several areas to consider when evaluating, and before selecting, a financial professional, such as:

**Trust** – The most essential quality of an advisor is integrity.

**Like-ability** – Find the kind of person you would want to work with.

**Competence** – Find an advisor who is a specialist in the area of planning that you need.

**Experience** – When looking for a retirement planning specialist, you definitely want an experienced professional.

**History** – Check their background and ask for referrals.

**Suitability** – You want an advisor who puts your interests above their own. Look for an advisor that has a **Fiduciary Duty** to their clients. In short, this means the planner has pledged, and is required by law, to act in a client's best interests at all times.

At the end of the day, finding the right advisor is extremely important as it can really make a difference in the ultimate value of your retirement plan.

To learn more, including more areas to consider as well as the most critical questions to ask when looking for an advisor, join me next week on the **It's Your Money Show**. The show airs on WMEQ (880 AM) on Thursday at 7:30am and Saturday at 9:00am, as well as on WWIB (103.7 FM) on Wednesday at 7:30pm and Saturday at 5:30pm. You can also obtain this information and independent advice for your specific situation by contacting me at **(715) 835-6022** or **info@KeyStoneCV.com**, or through our website, **www.KeyStoneCV.com**.

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