



# How to get the most value out of your advisor relationship

Here are some practical tips to consider as you begin your new relationship with me as your financial advisor.

## PRACTICAL QUESTIONS TO ASK

- What services do you provide?
- What can I expect from you?
- How are you compensated?
- How often will we meet?
- When will you contact me?
- How often do we review my portfolio and its performance?
- How often do we review progress toward my goals?

## When to contact me

You'd be surprised how often clients experience a financial, personal, or life change and don't think to contact their financial advisor. It's a good idea to get in touch with me, especially in the following instances:

### Personal or life changes, including:

- Marriage or Divorce
- Change in Employment
- Birth or death in the family
- Lawsuit

### Financial changes, including:

- Inheritance
- Significant debt repayment that may free up cash
- Work-related bonus or stock options
- Buying or selling a primary residence, or vacation or rental property

### Business changes, such as:

- Purchase or sale of a business
- Other business-related or large-flow expense

### Estate planning issues, including:

- Long-term care
- Asset transfer
- Generational planning
- Estate taxes
- Charitable giving
- Business succession
- Trust formation

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