

Forbes

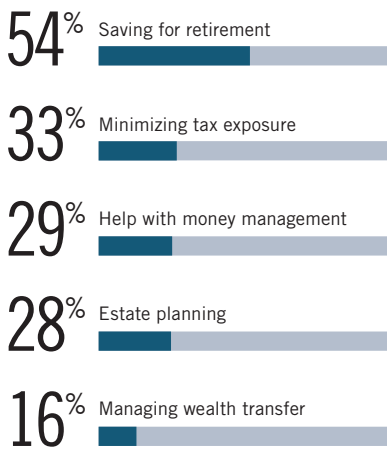
How To Find The Right Advisor – For You

Everyone’s financial position is different, and everyone’s financial goals are unique. Finding an advisor is a key first step to defining what’s important to you and outlining a path to achieve those objectives. What’s the best way to find an advisor that will meet your needs for the next 10, 20 or 30 years?

To help answer that, we surveyed individual investors, including high net worth individuals, to find out what matters most to them. Here’s what they said:

OUTLINE YOUR FINANCIAL GOALS

Before seeking an advisor, think about what’s most important to your financial future. By having a sense of your priorities ahead of time, you can direct your advisor’s attention to what matters most.



DETERMINE WHAT QUALITIES ARE MOST IMPORTANT IN AN ADVISOR

Not surprisingly, investors place a premium on advisor integrity. But only 1 in 3 actually know whether or not their advisor is a fiduciary, or someone who is legally bound to put their best interests first. This highlights an opportunity where you could ask more questions in order to understand the type of advisor you’re working with.

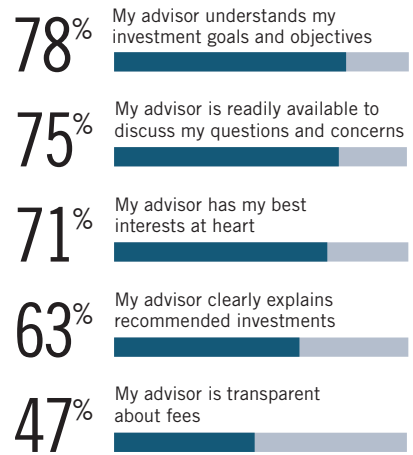


“With prospective clients, we go through a process and ask a series of questions, starting with, ‘What’s important to you?’ We have a frank and open discussion about their needs and determine how we can best meet their objectives.”

Gregory S.,
 Founder of an independent Registered Investment Advisor firm

DEFINE THE OPTIMAL ADVISOR RELATIONSHIP

The individuals who are most satisfied with their financial advisor identify the below characteristics as the reasons behind their successful relationship. Establishing the kind of dynamic you want with your advisor can lead to a healthy partnership.



Choosing an advisor shouldn’t be difficult. The three steps above can help get you started down the right path to finding someone who not only understands your financial goals, but can also help you achieve them.

Charles Schwab AdvisorVoice: To learn more, visit www.forbes.com/sites/charlesschwabadvisor

Based on a 2016 survey of 328 U.S.-based individual investors, including high net worth individuals, conducted by Forbes Insights in partnership with Charles Schwab.

Fiduciary: It's the word independent advisors live by.

Independent Registered Investment Advisors are held to the highest standard of care. As fiduciaries, they are required to act in the best interests of their clients at all times. That's why we support independent financial advisors. And why we think it's worth your time to learn more.

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