MAYHEW WEALTH MANAGEMENT LTD.

"Cycling the Journey of Financial Success"

Financial Consultant Interview Checklist

"Choosing a financial planner is the most important investment decision you'll ever make."

These questions are designed to help you be confident you've made a wise decision.
Any professional consultant should welcome the opportunity to give you the information you need.

1. **Are you a full time financial planner?**
2. **Have you had professional education beyond the minimum legal requirements?**
3. **How do you stay up to date in your field?**
4. **Do you have an articulated investing philosophy?**
5. **Do you have a personal financial planning process?**
6. **Do you present a full range of choices beyond a specific product line?**
7. **Can you provide access to a personal network of professionals we can use?**
8. **Do you have written relationship standards to which I can hold you accountable?**
9. **What role do referrals play in your business, and will you ask us for names?**
10. **What is your contact schedule for an account like ours?**
11. **Will I be dealing with you or an assistant?**
12. **What happens if I'm not happy with your service?**

Listen carefully to the answers you get.
Building and preserving wealth starts with being comfortable with your professional financial planner.