

8 Questions to Ask a Potential Financial Advisor in Your First Meeting

- What are your qualifications and experience?
- Are you a fiduciary?
- How do you get paid for your services?
- What services do you offer?
- What kind of clients do you specialize in serving?
- What is your investment philosophy?
- How do you assess and manage risk?
- How will we work together?



JOURNEY TREE
Financial Planning & Investments