

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

- How long have you been in the financial industry?
- What is your area of expertise?
- Are you a fiduciary?
- How do you charge for your services?
- How do you stay updated with the latest financial trends?
- What services do you offer?
- What is your investment philosophy?
- How do you assess and manage risk?
- How will we work together?
- Can you provide references?



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