

**The Finance Gurus Guide To Finding The Right Financial Planner**

Financial Planner: _____ Company Name: _____	
<b>Questions</b>	<b>Answers</b>
<p><b>1 - Qualifications and Experience.</b></p> <p><input type="checkbox"/> Can I please have a copy of your financial services guide?</p> <p><input type="checkbox"/> Are you a Certified Financial Planner? Why not if no?</p> <p><input type="checkbox"/> Can I see a copy of your authorised representation status?</p> <p><input type="checkbox"/> Do you have a finance degree?</p> <p><input type="checkbox"/> What did you study last at college/uni?</p> <p><input type="checkbox"/> What training and studies do you currently undertake?</p> <p><input type="checkbox"/> Describe your typical client?</p> <p><input type="checkbox"/> How long have you been a financial planner?</p> <p><input type="checkbox"/> What have you learned most as a financial planner?</p> <p><input type="checkbox"/> Summarise your skills, values and financial planning beliefs?</p>	
<p><b>2 - About the Company</b></p> <p><input type="checkbox"/> How old is the company?</p> <p><input type="checkbox"/> How long has the staff been at the company?</p> <p><input type="checkbox"/> What will occur when the owners retire?</p> <p><input type="checkbox"/> Is the company linked to major institution? If yes, will this compromise the advice?</p>	
<p><b>3 – Benefits for the FP working at this company</b></p> <p><input type="checkbox"/> What are the benefits for you working at this company?</p>	
<p><b>4 – Disadvantages working at this company</b></p> <p><input type="checkbox"/> What are the disadvantages for working at this company?</p>	
<p><b>5- What client experience will be delivered</b></p> <p><input type="checkbox"/> What is the client experience delivered at this company?</p>	
<p><b>6 – Fees for the services</b></p> <p><input type="checkbox"/> Please supply a schedule of fees for the services</p> <p><input type="checkbox"/> Important note – Challenge the fees and make sure you understand each and every fee</p>	
<p><b>7 – What if something goes wrong?</b></p> <p><input type="checkbox"/> Any long running unresolved complaints? If so why?</p> <p><input type="checkbox"/> If something goes wrong, how do I make a complaint?</p> <p><input type="checkbox"/> What experience does the company have with complaints?</p>	
<p><b>1 - Question For You</b></p> <p><input type="checkbox"/> Can I work and trust this financial planner?</p>	