13 QUESTIONS ADVISORS SHOULD PREPARE TO ANSWER

During your events and presentations, you should be ready to answer or clarify these questions and concerns attendees may have to increase your appointment ratio.

1. **How much in retirement savings do I need to work with you?**
2. **What happens at the first appointment, and what do I need to bring?**
3. **I already have a financial professional giving me advice, why should I work with you?**
4. **How are you compensated, and are there fees to work with you?**
5. **Do you have any partnerships with CPAs or attorneys that can help me?**
6. **What's your philosophy regarding wealth management?**
7. **I'm not happy with my current advisor, how can I transfer or move my assets without dealing with them?**
8. **Which professional designations or education training do you have?**
9. **Do you work with a particular demographic or niche, and how many clients do you have?**
10. **How often do you meet with your clients?**
11. **Can you provide me a list of all the services you provide?**
12. **Is there a transparent way for me to see how you manage my assets?**
13. **Is there a team supporting you? If so, who would be my primary point of contact?**

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