

# Evaluate Financial Professionals Worksheet

## Step 1: List the Services You Value Most

Service	Importance (High, Medium, Low)	Notes

## Step 2: Compare Potential Advisors

Advisor Name	Experience	Fees	Investment Approach

## Step 3: Prepare Questions to Ask During Consultations

- What credentials and designations do you hold?
- Are you a fiduciary?
- What is your investment philosophy?
- How are your fees structured?
- Can you share examples of how you've helped clients with similar goals?
- What tools or resources do you offer for ongoing financial education?