

Use the following questionnaire to interview your existing financial advisor, broker, financial planner or any prospective advisor you may be considering. It is paramount that you get answers to all of these questions in writing to assure you are working with a Financial Fiduciary who assures you that any and all advice provided to you is truly in your best interest. If you insist upon getting all of the right answers to the following questions, you will avoid the inherent conflicts of interest which exist in most advisor/consumer relationships.

[Download our Fiduciary Questionnaire and Checklist](#)