

QUESTIONS TO ASK YOUR

Financial Advisor

And why you need to

Why Ask Questions?



To understand financial products



To eliminate confusion



To ensure you hit your goals

“

Your advisor should be passionate about financial education and encourage you to ask questions. Do not implement financial decisions you do not understand.

Cody Garrett

Owner of Measure Twice Financial

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5 Questions to Ask Your Financial Advisor Regularly



Specific Questions for Different Stages of Life

College Graduate

- What insurance coverage do I need?
- How can I start retirement planning?
- How do I pay off student loans?

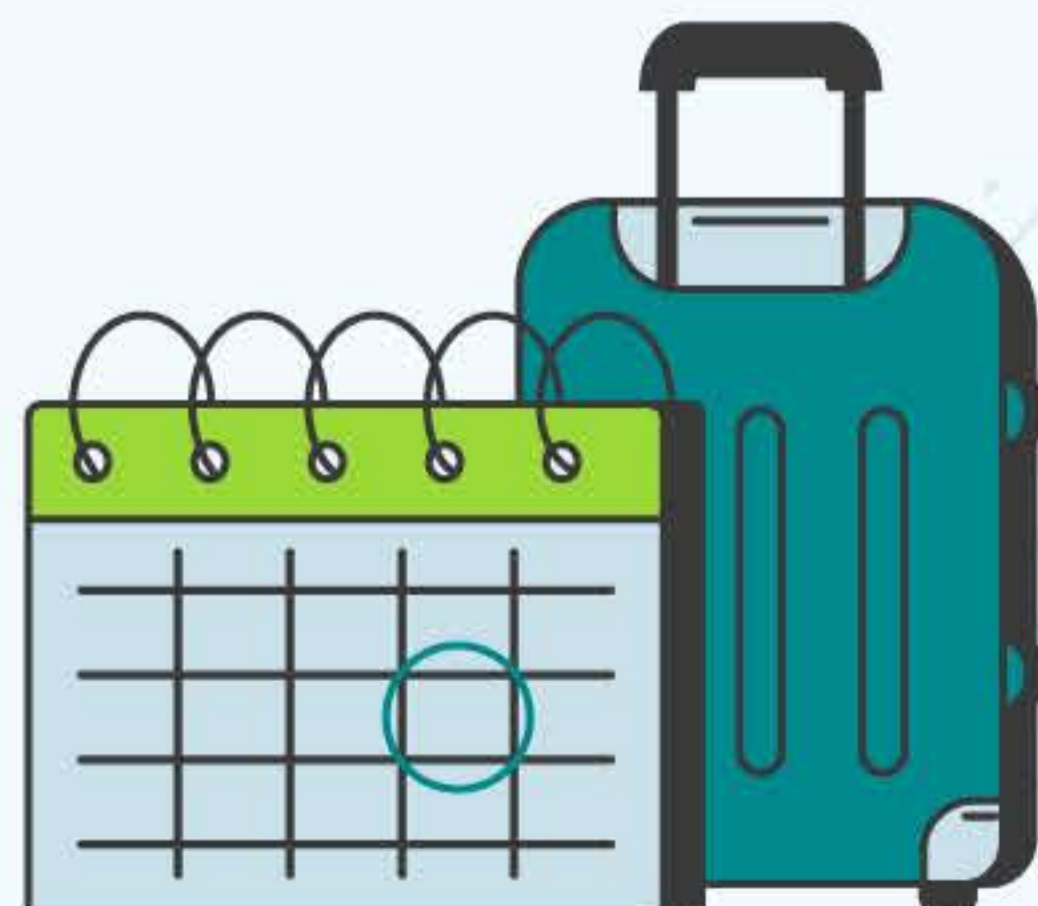


Married with a Family

- How do we build college savings?
- How can we combine finances?
- Do we have enough insurance?

Close to Retirement

- Do I need to increase my savings?
- How do I get ready for retirement?
- Are there last-minute things I need to do?



Retired

- When should I claim Social Security?
- How can I continue to make money?
- How can I prepare an estate plan?

