Questions to Ask Your Financial Advisor

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, to not implement financial decisions you do not understand.

Cody Garrett
Owner of Measure Twice Financial

5 Questions to Ask Your Financial Advisor Regularly

- Are my investment strategy and retirement plan on track?
- How can I better prepare for financial emergencies?
- What can I do to minimize taxes each year?
- How should my goals change based on life changes?
- How can I maximize and protect my money?

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?