



How To Find The Right Financial Adviser

- Not everyone needs one
- Ways an advisor can help:
 - Technical knowledge
 - Understanding your values and beliefs
 - Knowing what you want from life – “meaning in the money”
- How to find one:
 - Friends/Family/Colleagues
 - Via professionals: accountants, lawyers
 - Networking
- Other considerations:
 - Do they ask interesting questions - provoking and challenging your thinking?
 - Choose someone you are happy to have a long-term relationship with
 - Are they “whole of market”/independent?
 - Performance of company against benchmark for the industry/product