



Who Are the Important People In Your Life?

We all have a short list of important people that are on the periphery of our lives. Establishing a relationship with a good family physician is probably a top priority for most of us. Aside from the family doctor, a financial advisor is one of the most important relationships you'll ever have. It is the one person who can help you establish a stable and secure financial future.

All it takes is one life event to change the trajectory of your financial well-being. Getting a good night's rest might be easier if you had a trusted advisor to keep a good health check on your assets.

Which scenario best describes you?

- You have too many accounts in too many places and you don't have a clear picture of your total net worth or how it is being managed.
- You've accumulated some assets throughout your life, and you're concerned about family conflicts that could occur after you're gone.
- You don't know who will run your family farm after you retire.
- You are recently married, divorced, widowed or recently changed jobs.
- You've recently paid a lot more for estate taxes than you ever imagined possible.
- You have a small business with a limited budget, but want to provide added value to your employees.
- You're the recipient of a recent inheritance and not sure what to do with it.

Regardless of your current circumstances, now is the time to lay the groundwork for a healthy and secure financial future. And choosing the right financial advisor is the first step to getting it right. Here are the top four things to look for when selecting a Wealth Management advisor:

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| Fiduciary Commitment | The advisor is ethically bound to act in your best interest. |
| Access to Resources | Your financial advisor should have access to a diverse pool of resources to maximize the potential of your account. |
| Transparency | There should be absolutely no hidden costs in their fee structure. |
| Proven Track Record | The financial advisor servicing your account should have a long and established history of helping clients maximize their financial portfolio. |

Life is full of change, and unexpected turns. You've worked too hard to get this far to risk losing what you've worked so hard to earn. Schedule your next checkup...with your family physician **and** your financial advisor. Protect the most important people in your life by identifying the most important people who can help you do it.

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