7 Questions Your Financial Advisor Should Be Asking You

Cetera® PLANNING PARTNERS

The right questions can help connect your goals, concerns, and financial decisions. If your current plan does not reflect conversations like these, it may be time to revisit your approach.

7 **What keeps you up at night, and what excites you about the future?**
Your concerns and goals help shape the planning conversation.

6 **How involved do you want to be in managing your investments?**
Whether you prefer hands-on or hands-off, your strategy should reflect your style.

5 **What would you do if you had to retire earlier than expected?**
A strong plan prepares for the "what ifs," not just the "what's next."

4 **If the market dropped, would you see it as a threat or an opportunity?**
Your comfort with risk matters just as much as your returns.

3 **How might your health impact your finances?**
Wellness planning is part of financial planning, especially as you age.

2 **What matters most in your advisor relationship?**
The right partnership is built on trust, clarity, and shared values.

1 **What financial goals are you working toward?**
Your goals define the direction of your plan.

To Take Control of Your Financial Future:

www.ceteraplanningpartners.com
Give us a call at 866.498.8898