Peebles Martin
Wealth Management
BMO Nesbitt Burns

8 Questions To Ask Your Advisor Right Now

1. How is my written financial plan reflected in my investments? *If you don't have a comprehensive plan, ask why the Advisor has not prioritized this vital document.*

2. Can you tell me right now what a sustainable spending range is for me in retirement? If not, do you feel this is acceptable that we don't know this?

3. In one sentence – what are my total out-of-pocket fees? Is that what you are paying personally?

4. Do you and I own all the same investments? Why not?

5. What is your process for monitoring and selling each one of my investments? How is this done when you're out of the office?

6. What confidence will I have that the structure of my investments will be stable in all market cycles so that I'm not distracted or financially harmed?

7. I'm expecting to live another 30+ years – will you still be my Advisor? Will you be the one to help transition the wealth to my heirs?

8. Who will be accountable to ensure harmony between my Will, estate, portfolio and family members once I'm gone?

Getting started is easy.

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