



# **Do You Need a Financial Planner?**

# Do You Need A Financial Planner?

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There is no simple answer. Each person is unique and each situation is different. However if you spend a few minutes looking over the following list of questions, you should have a pretty good idea if you should consider using a financial planner.

**Take this short quiz and find out if a Financial Planner is right for you.**

- **Would you like to be more in control of your financial life?**
  - Yes • No
- **Do you feel your financial situation is challenging and that you could use more sophisticated financial advice and financial services?**
  - Yes • No
- **Are you frustrated by all the conflicting financial advice you hear?**
  - Yes • No
- **Are you tired of spending your leisure time looking after your finances?**
  - Yes • No
- **Do you feel that you should be able to save more money than you do, considering the level of income you earn?**
  - Yes • No
- **Do you think you could be doing better with your investments?**
  - Yes • No
- **Are you concerned that you might be paying too much in taxes?**
  - Yes • No
- **Would you like help dealing with your estate or retirement planning?**
  - Yes • No
- **Do you let important financial decisions slide because you just don't seem to get around to them?**
  - Yes • No
- **Are you concerned that your wealth is not growing quickly enough?**
  - Yes • No

Are you trying to accumulate money toward a specific goal, such as retirement or child's education or a new home? If you have answered yes to one or more of the questions above you should consider the assistance of a Financial Planner. Contact us today for a confidential discussion.