CONFIDENTLY SELECTING A CHRISTIAN FINANCIAL ADVISOR

You may not realize that God equipped you to be an expert in selecting a financial advisor. As a woman, your natural curiosity, ability to ask questions and intuitive judgment have prepared you well for this adventure of discovering the ideal advisor for you and your family.

The process of selecting an advisor is like finding a good doctor. You'll evaluate candidates based on their technical competence, shared values as well as a comfortable relationship. Approaching the search with thoughtful discovery questions will help you find the advisor that fits you and your life circumstances. This guide will help you get started.

VALUES ALIGNMENT

Topic	Possible Question	My Question	What to Listen For
Source of Advice	What guiding principles do you use to provide advice?		Values which mirror yours and an advisor who incorporates biblical wisdom into their advice
Worldview	What is your worldview regarding money?		An understanding that God owns everything and an eternal perspective on the use of money
Motivations	Why do you do what you do?		A story of purpose and calling to serve
Other Topics?			

TECHNICAL EXPERTISE

Topic	Possible Question	My Question	What to Listen For
Training/Expertise	What are your strengths and weaknesses in expertise and practice?		Specialized training/ certification in areas important to you along with a willingness to clearly identify weaknesses
Experience with similar clients	Have you helped people like me with similar issues? If so, what did they say was the value to them?		Specific cases with similar circumstances and clear outcomes- You may even want to talk to other clients of theirs.
Compensation Fees = paid for time Commissions = paid through product sales	How do you charge for your services?		A breakdown of fees/ commissions - a fee-based service approach is typically a smarter approach for unbiased planning without 'product sales' pressure
Other Topics?			

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LEADERSHIP – ABILITY TO PROVIDE MOTIVATION AND DIRECTION

Topic	Possible Question	My Question	What to Listen For
Communication Rhythm	How will we connect and communicate in order to foster a good relationship over time?		Frequency and methods of communication that fit your personal life stage and circumstances
Communication Style	How do you explain key financial concepts to your clients and do your clients say you've helped them grow in their knowledge?		Advisor is concerned that you grow in your knowledge and are equipped to make wise choices
Quality of service	When was the last time you lost a client? Why?		Honesty regarding weaknesses as well as commitment to service standards
Other Topics?			

COUNSELOR – ABILITY TO OFFER WISE INSIGHT AND SUPPORT

Topic	Possible Question	My Question	What to Listen For
Priority of family mission over investment objectives	What process do you use to discover our needs and design a plan to meet them?		Methods to identify and incorporate the family's values and objectives
Family unity	How can you help us become more financially aligned?		A commitment to honor each family member's purpose and passions
Other Topics?			

POST-INTERVIEW CHECKLIST

- Am I comfortable working with the advisor?
- Did the advisor seek and value my input?
- What unspoken messages did I receive from the office staff and environment?
- Did the advisor's references report experiences that would meet my expectations?