

6 DRIVERS OF A SUCCESSFUL ADVICE RELATIONSHIP

Learn the role of advisors and the benefits of working with an advisor in building long-term wealth.

CHARACTER

Possesses integrity and self-discipline that elicits trust

1

CHEMISTRY

Creates a human connection built on mutual respect and shared goals

2

CARING

Demonstrates empathy and truly cares about your financial aspirations

3

+270%

Wealth accumulation by investors who work with an advisor vs. someone who invests without advice.*

4

COMPETENCY

Has the necessary skills and experience to help you achieve your goals

5

COST-EFFECTIVE

Offers solutions that add value to your portfolio at a reasonable cost

6

CONSULTATIVE APPROACH

Is an effective listener who collaborates and doesn't dictate



Watch the videos!

PART 1 – The 6 Drivers of a Successful Advice Relationship

PART 2 – 7 Questions to Ask a Financial Advisor

7

QUESTIONS TO ASK A FINANCIAL ADVISOR

The answers will help you distinguish each of the 6 drivers in an advice relationship

1. How will you work with me to help me achieve my goals?
2. How will you address my key financial concerns?
3. Do you specialize in working with certain clients?
4. Do you work as part of a team?
5. What made you decide to become a financial advisor?
6. If we decide to work together, what will that process look like?
7. Why are you the right advisor for me?

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