

# 5 things to think about before meeting a financial planner

## 1 Decide what you're looking for

Do you want advice on an ongoing basis? Or is it just a one off piece of advice? Some advisers and planners will only work on an ongoing basis.



## 2 Do you want Independent or restricted advice?

Think about whether you'll want an adviser who can independently recommend products across the whole market or a firm that can only recommend a restricted number of products?

You can find out if a firm is restricted or independent by visiting [www.register.fca.org.uk/](http://www.register.fca.org.uk/)



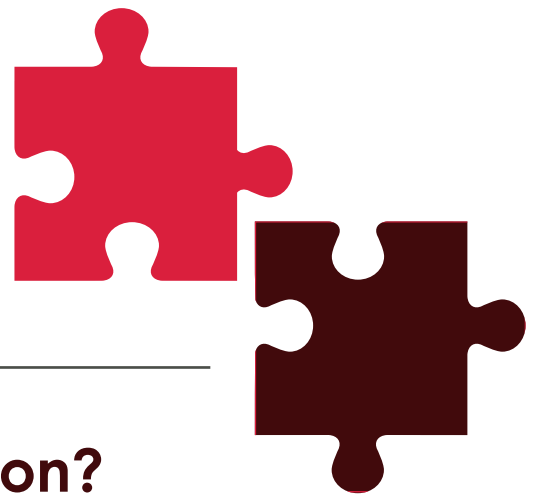
## 3 Your financial fears and goals

Be prepared to tell your adviser what your end goal is and what you'd like to achieve along the way. Also be prepared to share any issues or concerns about money that keep you awake at night. This will allow your adviser to have a full picture of your financial world, ensuring any advice provided hits the mark.



## 4 Your fit

Financial advice is a very personal experience. Make sure you choose a firm and adviser that reflects you and your values. It's the best way to develop a healthy client-adviser relationship.



## 5 How complex is your situation?

The more complex your situation, the more you will benefit from the support of a multi-adviser business, having access to a broad range of technical knowledge and experience. In addition, a larger firm may provide access to a strong network of other professional advisers, such as lawyers or tax experts.



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