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Personal Financial Planning : How To Find The Right Estate Planner For You **By News Canada**

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Five must-ask questions

(NC)-Beware of estate planners charging little or nothing to draft your estate plan. They are likely earning a commission on the investment products they recommend - which could compromise the objectivity of their advice. And note that competent estate planners should offer a holistic approach to estate planning. That is, an objective and skillful adviser provides more than investment strategies or financial planning advice.

When looking for the right estate planning adviser, consider these key questions:

What is your previous estate planning experience and have you worked with clients like me?

Do you have in-depth knowledge of relevant legislation such as income tax law, provincial family law and probate acts?

How do you set your fees? Do you sell life insurance, mutual funds or other investment products?

I would like to set time lines and how can you help me meet those deadlines?

Can you refer me to other professionals, as needed, such as a lawyer or an accountant?

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How To Find The Best Financial Planner

By Simon Oldmann

How do you go about finding the best financial planner for your money? Well, like many people, you are probably very skittish when it comes to trusting just anyone with your money and for good reason. However, the skittishness could work to your advantage, when it comes to finding the best financial planner.

In these times, any person walking down the street can proclaim themselves a financial planner, the key is to knowing the good from the bad. Many people have found the market for financial planners is strong because the demand grows with each passing day for financial product advice as people are readying themselves for retirement and other issues become more complex.

Attorneys, accountants, insurance agents, and brokers are all becoming financial planners in addition to their current titles; this may not mean they have your best interests at heart either. This may come at a surprise to you; however, as unfortunate as it is, it is a reality. It is extremely important that you conduct full research to avoid running into an instance where your money has suddenly disappeared without an explanation.

It is also important that you keep in mind, just because a person claims to be a financial planner, does not mean that they have guidelines, or processes that they follow. Therefore, the first thing you must do is find potential financial planners. This can be done easily by searching online, using your favorite search engine, and locating financial planners organizations or you could also talk to you friends, family members, or colleagues and find out whom they recommend. It is important that you trust the judgment of any person you are seeking advice from, when it comes to finding the best financial planner.

After you have gathered a list of prospective financial planners, it is time to start contacting them. Telephone contact should be the first step, through this contact you can ask a variety of questions and eliminate those that do not meet your needs. Some things you should paying attention to during these telephone calls include if they sound to rushed, you will want to dismiss them as potentials. Furthermore, if their asset minimums are simply too much for you, you should dismiss them as well.

Personal and in person meetings are required before you decide on the best financial planner. You will not simply want to make a decision based on telephone conversations and contact. Meeting with the financial planner yourself is the only way to fully determine if you feel good about that specific person. It is suggested that you have at least three meetings before making a decision.

During the meetings, in order to help you determine who the best financial planner is ask the following questions. How many years have you been a financial planner? Do you have any specialty areas? Educational Funding? Estate Planning? You should also be asking what their typical client has in financial and assets needs. This question will help you determine if they are the best financial planner for you.

Simon Oldmann has been studying personality traits for 10 years, with a focus on the effects of financial planning on health and mental stability. Simon is currently writing tips and advice on Financial Planning at <http://financialiq.zupatips.com/>

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