



# FINDING YOUR DREAM FINANCIAL ADVISOR



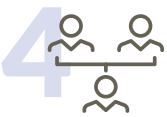
Use Google to search the websites and other information on financial advisors or firms that seem compatible with your goals.



Don't sweat geography. With today's technology, you can communicate and conduct business efficiently remotely, so don't pass up a good fit because the advisor doesn't work in your area.



Do find someone who makes you feel like you are being heard and who is accessible and available when needed or when the market or other factors change. And pick someone you feel you can work with over the long haul. This should be a relationship that grows stronger over time.



Consider asking for referrals from friends, family members or co-workers who are pleased with the services of their own financial advisor.



Once you've narrowed your list to advisors you think you would like, it's time to check out their credentials and other background information.



Check for compliance and criminal records, licensing, registration and fiduciary status.



Check [Brokercheck.com](https://www.brokercheck.com) for compliance background.



You can also check records with the Financial Industry Regulatory Authority (FINRA), the Securities and Exchange Commission (SEC), the Certified Financial Planners board (CPF) or with other membership associations the advisor is affiliated with.



Take a deeper dive into a potential advisor's website to get a look at the team and mission statement, thus giving yourself a chance to learn a bit more about the company before you meet.