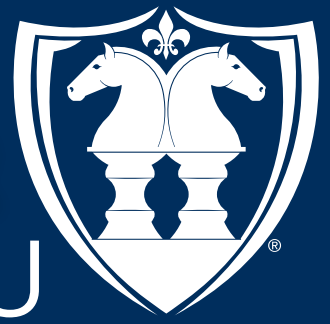


# 7 QUESTIONS YOUR FINANCIAL ADVISOR SHOULD BE ASKING YOU



Every climb needs the right guide and the right questions. If your current plan isn't built around questions like these, it may be time for a new route. We're here when you're ready to keep climbing.

**7 What keeps you up at night, and what excites you about the future?** These answers shape everything else. They are the summit of your financial story.

**6 How involved do you want to be in managing your investments?** Whether you prefer hands-on or hands-off, your strategy should reflect your style.

**5 What would you do if you had to retire earlier than expected?** A strong plan prepares for the "what ifs", not just the "what's next."

**4 If the market dropped, would you see it as a threat or an opportunity?** Your comfort with risk matters just as much as your returns.

**3 How might your health impact your finances?** Wellness planning is financial planning, especially as you age.

**2 What matters most in your advisor relationship?** The right partnership is built on trust, clarity, and shared values.

**1 What financial goals are you working toward?** Your goals define the direction of your plan.

