

FINDING A FINANCIAL ADVISOR YOU CAN TRUST



www.TheRetirementPath.com

405-842-3443 OKC

972-377-2850 Frisco



Excerpt from "Five Steps to Finding a Financial Advisor
You Can Trust"

By Randy L. Thurman, CFP[®], CPA/PFS[™]



THREE ESSENTIAL QUALITIES OF A TRUSTWORTHY FINANCIAL ADVISOR



1

They have expertise in your area of need

- Experience (Do they have enough?)
- Credentials (What documentation can they provide?)
- Knowledge (Are they knowledgeable in the areas that are most important to you?)

2

You can trust them to prioritize your best interests

- Independence (Do they have it? Is there a conflict of interest?)
- Background check (Is their history clear or problematic?)
- Fiduciary (Are they committed to putting your interests first? Do they have a duty of care?)
- Limitations (Do they know what their limits are?)

3

They care about you

- Investment philosophy (Does it match yours?)
- Compensation (Do they have a vested interest in seeing you do well?)
- Workload (Are they overworked?)
- Collaboration (Do they do it all or work with other trusted professionals such as your CPA and attorney?)



HIRING AN ADVISOR

"An investment in knowledge pays the best interest "

- Benjamin Franklin

Investing in expert advice is a smart decision. A skilled financial advisor can provide far greater value than the cost of their services. They assist you in navigating crucial decisions related to Social Security, Required Minimum Distributions (RMDs), tax planning, generational wealth transfer, and risk management. Your advisor can help ease your concerns during challenging times and keep you grounded during prosperous moments. By helping you stay on track, they keep you focused on achieving a worry-free income for life, regardless of circumstances.

A reliable advisor possesses knowledge, trustworthiness, and a responsiveness to your needs. By considering the qualities of a dependable financial advisor, you will be well-equipped to identify suitable candidates for your needs.



Your Guide on the Path to Retirement



If you're ready to get started on the path to retirement, we are happy to schedule a complimentary consultation with one of our CERTIFIED FINANCIAL PLANNER[®] professionals.

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