

## ***Do you need a Financial Planner?***

Although everyone needs financial planning, not everyone needs a professional financial planner. If you're pretty sure you do, why not be proactive?

Click [here](#) to find the CPA financial planning professional closest to you.

To learn more about what financial planners can do for you, click on [Working with a Professional](#).

*If you're not sure about financial planners, look over these questions. They'll help you decide if a financial planner is a right choice for you.*

Do you feel your situation is challenging and that you need more sophisticated financial advice and financial services?

Would you value a relationship with a financial planner who will create a customized personal financial strategy for you?

Do you believe estate planning and trusts are the most tax-efficient way to pass wealth onto your heirs?

Would you sleep better if you had a professional you could trust looking after your finances and your financial planning?

Would you like to have a specialist you can call whenever you need financial advice or a 2nd opinion?

Are you frustrated by all the conflicting financial advice you hear?

Are you tired of spending your leisure time looking after your finances?

Would you like a non-biased opinion on your insurance needs?

Do you think you could be doing better with your investments?

Are you concerned that you might be paying too much in taxes?

Do you need help dealing with your retirement planning?

If you answered "Yes" to even one of these eleven questions, you should probably give some thought to using the services of a financial planner.