

Signs that you should be using a financial planner

There is no simple answer. Each person is unique and each situation is different. However if you spend a few minutes looking over the following list of questions, you should have a pretty good idea if you should consider using a financial planner.

Take this short quiz and find out if a financial planner is right for you.

Would you like to be more in control of your financial life? Yes No

Do you feel your financial situation is challenging and that you could use more sophisticated financial advice and financial services? Yes No

Are you frustrated by all the conflicting financial advice you hear? Yes No

Are you tired of spending your leisure time looking after your finances? Yes No

Do you feel that you should be able to save more money than you do, considering the level of income you earn? Yes No

Are you concerned that your investments might be what someone needed to sell rather than what's best for you? Yes No

Do you think you could be doing better with your investments? Yes No

Are you concerned that you might be paying too much in taxes? Yes No

Would you like help dealing with your estate or retirement planning? Yes No

Do you let important financial decisions slide because you just don't seem to get around to them? Yes No

Are you concerned that your wealth is not growing quickly enough? Yes No

Are you trying to accumulate money toward a specific goal, such as retirement or child's college education or a second home? Yes No

Have you recently come into a large sum of money? Yes No

Would you like a non-biased expert to review your total financial situation? Yes No

Would you like to have a financial professional you can call whenever you need advice or would simply like a 2nd opinion? Yes No

How did you do?

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

If you answered "Yes" to two or three, it would likely be a wise thing to do. If you said "Yes" to four or more, why wait? Be proactive and click [here](#) because a financial planner can definitely help you.