

What Makes a Great Financial Advisor?

Financial Planning Expertise

*Holistic Approach
Short & Long Term Goal Consideration*

Behavioral Coaching

*Use of Facts & Historical Insights to Inform Clients
Value & Goal Recognition
Protection from **Yourself***

Accountability

*Help Clients Honor Their Commitment
Goal-Oriented
Regular Progress Reviews*

Client Empowerment

*Educate Clients
Help Clients Understand Plan Framework*

Client-Centricity

*Problem-Solving Focus
Collaboration with Clients
Comprehensive Plan Creation*

Transparency

*Open About Fee-Earning
Candid About Challenges*

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A great financial advisor will start all conversations with questions, not answers. They will want to understand what you value, your pain points, your goals, and aspirations.

They will use their years of training and experience to create a thoughtful framework that will lead to a comprehensive plan of attack. .

This plan won't be stored in your attic to be forgotten - the advisor will make sure it is a dynamic document that changes as you evolve as a person

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