



## HOW TO PICK A FINANCIAL INSTITUTION AND AN ADVISOR

Any relationship begins with questions. That especially goes for the people who will be managing your life savings. Here are some questions to ask potential 403(b) advisors when you're shopping around for a financial institution to manage your savings.

Are you registered as an investment advisor?

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How will I pay for your services?

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What experience do you have?

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What services do you offer?

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What is your approach to financial planning and investing?

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Can you provide three references?

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Do you have a financial interest in the entity that houses my account?

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How often will we interact?

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Is there anything in your regulatory record that I should know about?

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Ask yourself: Did he or she ask me questions and seem to be interested in me?

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