ANATOMY of an *Advanced* FINANCIAL ADVISOR

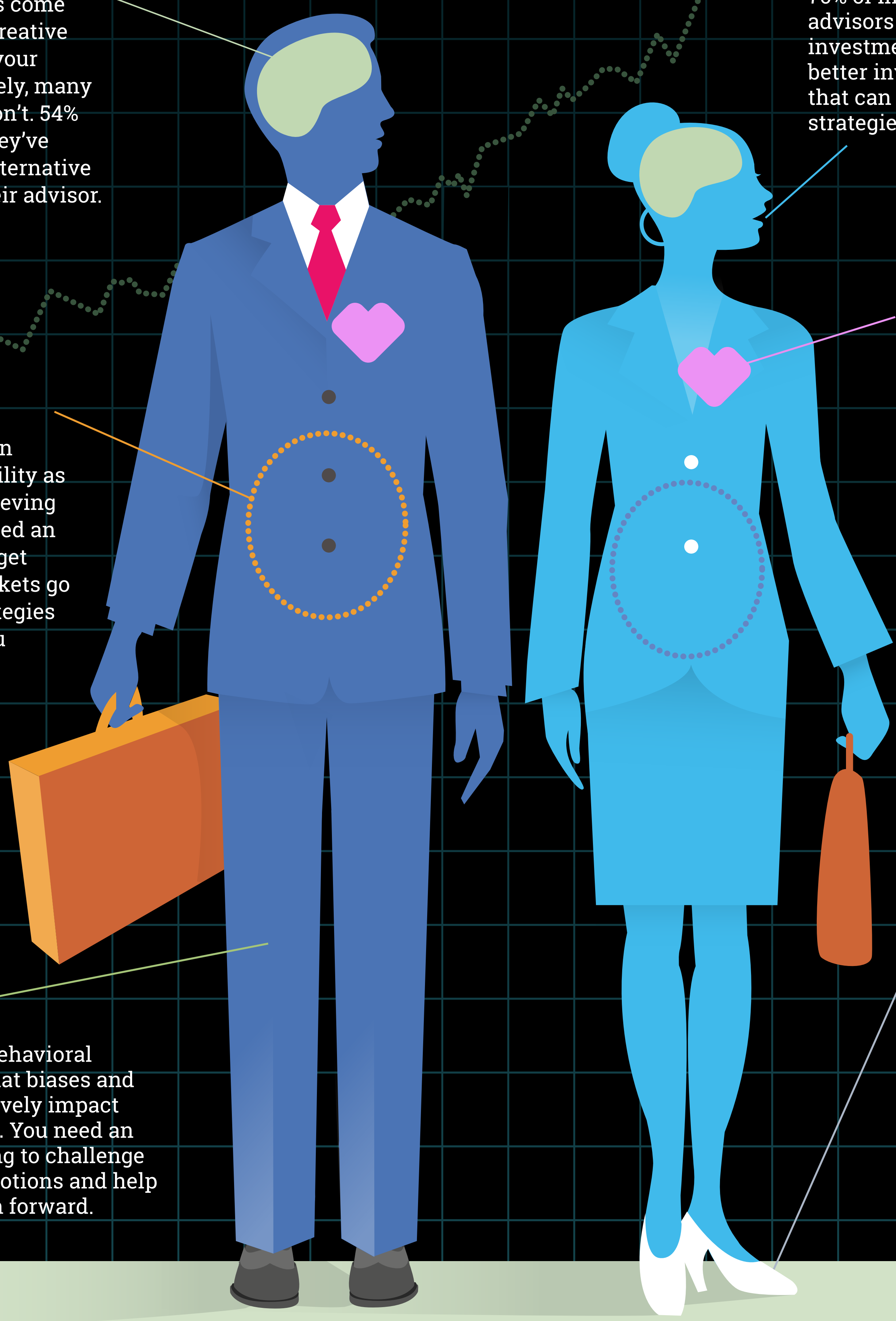
Selecting the right financial advisor is a personal and oftentimes challenging task. After all, you put much of your financial future in you advisor's hands. You don't want an advisor that simply has all the certifications, you want someone with advanced skills that help you reach your true goals and achieve financial peace of mind. Below are six qualities that make up the advanced financial advisor.

FLEXES CREATIVE MUSCLE

Advanced advisors come up with new and creative solutions to meet your needs. Unfortunately, many typical advisors don't. 54% of investors say they've never discussed alternative strategies with their advisor.

SPEAKS YOUR LANGUAGE

70% of investors say they want advisors to provide education on how investments work or how to become better investors. You want an advisor that can clearly explain complex strategies in terms you understand.



CAN TAKE A GUT PUNCH

More than six in ten investors see volatility as a roadblock to achieving their goals. You need an advisor that won't get nervous when markets go down and has strategies in place to help you manage risk.

COMMITS TO YOU

Investors rank trust as the most important factor in the client-advisor relationship. An advanced advisor builds long-term client relationships that help them achieve their life goals.

STANDS UP TO YOU

Newer research in behavioral economics shows that biases and emotions can negatively impact retirement planning. You need an advisor that is willing to challenge your preconceived notions and help you see a better path forward.

PUTS THEMSELVES IN YOUR SHOES

Investors with empathetic and understanding advisors are four times more likely to stay with that advisor. Financial recommendations based on boilerplate questions won't fly. You need an advisor that understands your life situation.

SOURCES

http://durableportfolios.com/docs/591/253/2015%20Individual%20Investor%20Survey%20white%20paper_FINAL.pdf
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