

Chris Ball.

Your financial coach.

Fit requirements

- ☐ Does your advisor use jargon and industry language that was hard to understand?
- ☐ Does your advisor listen to your needs and concerns?
- ☐ Do you take a hands on approach to managing your wealth?
- ☐ Has your current advisor helped you clearly articulate your goals and objectives?
- ☐ Do you implicitly trust your advisor or do you feel like you are always "being sold" a strategy or product?
- ☐ Do you find that your busy lifestyle prevents you from being able to proactively manage your financial affairs?
- ☐ Do you regularly keep your advisor apprised of changes in your personal situation?
- ☐ Are you looking for an advisor that will partner with you in the development, implementation and monitoring of a financial plan?
- ☐ Do you like to ask questions?
- ☐ Do you value regular contact with your advisor?



GESTION DE PATRIMOINE
ASSANTE
WEALTH MANAGEMENT

Hydrostone

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