



VOICE OF INDEPENDENT FINANCIAL SERVICES FIRMS  
AND INDEPENDENT FINANCIAL ADVISORS

## **GETTING STARTED: WHY WORK WITH AN INDEPENDENT ADVISOR**

**An independent financial advisor can help you achieve your financial goals. Below is a list of few of the ways an independent financial advisor can help you.**

- Assessing your current financial situation
- Determining financial goals and developing a plan to achieve them
- Monitoring progress of your plan and making sure you remain on track to achieve your goals
- Offer perspective on the current state of and events in the economic market
- Making major financial decisions
- Taking care of aging parents

**Once you start working with an independent financial advisor, it is important that you meet with him or her regularly to ensure you are on course. However, there are a few milestones in which it is critical to consult your advisor:**

- Getting married or divorced
- Having or adopting a child
- Paying for your children's college tuition
- Buying or selling a business
- Receiving an inheritance
- Retiring
- Developing an estate plan
- The death of your spouse

Sources:

[Working with a Financial Advisor](#), Goldman Sachs Asset Management

[Working with a Financial Advisor](#), FoxBusiness.com