

10 BUILDING BLOCKS FOR A SUCCESSFUL ADVICE RELATIONSHIP



**GET READY TO
ASK THE RIGHT
QUESTIONS.**



- 1 What made you decide to become a financial adviser?
- 2 If we decide to work together, what will that process look like?
- 3 Why are you the right adviser for me and how will you address my key financial concerns?
- 4 Do you specialise in working with certain clients?
- 5 Do you work as part of a team?

BUILD A RAPPORT WITH YOUR ADVISER



DID YOU KNOW

Using an adviser adds over **3%*** a year in potential returns compared to a 'Do it yourself' approach.

* Source: Vanguard research, Putting a value on your value: Quantifying Vanguard Advisor's Alpha

WHAT SHOULD YOU DO NOW?

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