NATIONAL ADVISORS TRUST

Find an Advisor

The following questions can be used as a guide when interviewing potential financial advisors.

- [ ] Are you a fiduciary 100% of the time? (If they dodge, that's a red flag.)
- [ ] What is your minimum client size?
- [ ] What is your investment philosophy?
- [ ] Who will I work with — you or a team?
- [ ] How will we communicate and how often?
- [ ] Do you provide estate and trust services in-house or do you partner with experts?
- [ ] Can you or your partners act as a corporate trustee if needed?
- [ ] Have you worked with clients whose estate looks similar to mine?
- [ ] How are you compensated — fee-only, commission, or both?
- [ ] Do you create the legal trust documents, or coordinate with an attorney?