



ASALYN COACHMAN
Coaching Clients to Wealth

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Questions to ask a prospective financial advisor.

1. What is your process for making money decisions?
2. What financial strategies do you use?
3. How do you get paid?
4. What licenses do you hold?
5. What companies do you work with?
6. Describe your typical client or client demographic? Age, income?
7. Do you work alone or as part of a team?
8. How often do you meet with clients?
9. What are the services you/your company provide?
10. How long have you been a financial advisor?



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