

10 REASONS WHY YOU SHOULD WORK WITH A CFP® PROFESSIONAL

1

Not every financial professional is a fiduciary, but a CFP® professional is. Accordingly, a CFP® professional is legally obligated to put your interests first when providing financial planning and investment management advice.

2

Have you checked what type of education your financial advisor has? A CFP® professional has a college degree and a minimum of 3 years of financial planning experience. He or she has also completed an extensive exam requiring a great deal of preparation.

3

CFP® professionals have spent thousands of dollars and hundreds of hours making sure they are the best professionals they can be. Why would you work with anyone else?

4

With financial information being so readily available, wouldn't it be nice to work with someone who knows the good advice from the bad? A CFP® professional has spent time analyzing data and various investment solutions to determine what might be best for you.

5

When you're searching for a financial planner or investment advisor, knowing that they have a professional certification specifically relating to the area you're seeking guidance on can bring a sense of confidence in their abilities.

6

The CFP® certification is viewed by the financial planning profession as the best certification one can hold. It's in your best interest to work with the best financial professional you can find.

7

Working with insurance salespeople will have you leaving their office with an insurance product. Working with CFP® professionals will have you leaving their office with a customized plan for your situation.

8

A CFP® professional is not only trained to provide impartial advice on investments, but also on income taxation, retirement planning, employee benefits, estate planning, insurance, debt management, and everyday finances. No question is too big or small.

9

The financial world is continually changing. A CFP® professional has to continually take classes to keep up with these changes and keep their certification. Having a professional with a continually updated body of knowledge is essential to keep your finances up-to-date.

10

The CFP Board, which awards the CFP® certification, has the power to revoke the certification from a planner. They field consumer complaints on their members to ensure they are still worthy of using the certification. When your advisor says they are the best fit for you, is it just their word or a national board backing them up on that claim?

LEN HIRSH, MBA, CFP®, CPWA®, AIF®
Partner
lhirsh@seia.com

SEIA