

## Checking References

How long have you been working with this financial advisor?

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What would you say are this advisor's strengths and weaknesses?

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How often do you hear from this advisor?

- Once a month
- Every quarter
- Every six months
- Annually
- Other: \_\_\_\_\_

Are your calls or e-mails returned promptly?

- Yes
- No

What do you appreciate most about your relationship with this advisor?

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Do you have any reservations about recommending this advisor?

- Yes
- No

If yes, explain:

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How would you rate the services you have received?

- Excellent
- Satisfactory
- Less than satisfactory

Any other additional comments?

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