

## How to Find a Financial Professional

I am a participant in the larger community of financial advisors. So, for instance, I rub shoulders with commercial, personal and mortgage bankers, with financial planners, money managers, trust officers and commercial, life and property insurers.

I have services that would be of use to their clients and they have products and services that would be of use to mine. As a result, I spend a fair amount of time becoming familiar with what's being offered within the financial services industry. In addition to evaluating products and services, I'm sizing up the character, intelligence and product knowledge of the representative and the financial stability and reputation of the company for which they work.

This store of knowledge can be useful to you.

- . • Do you need a mortgage for a residential or commercial property?
- . • How about a new money manager for your stagnant portfolio?
- . • Does your business require a line of credit or an equipment loan?
- . • Are you satisfied that your home and personal property are adequately insured?
- . • Is your estate plan current?

These and a wide array of similar client issues cross my desk every day. I almost always have an opinion and a recommendation; I'm rarely stumped.

Furthermore, I value my objectivity and independence. As a result, I will not take fees from those to whom I refer clients. Doing so would constitute a clear conflict of interest, even if, in my unreserved opinion, the best interest of my client is served. In my view, even the appearance of impropriety is damaging.

So, if you're wondering what to do or where to go with something having to do with your financial life, you might want to give me a call. I probably have a good solution.