Are We a ‘Fit’ to Work Together?

Beginning Your Client Relationship

At the Harris-Lowe Group, we strive to provide the client experience you want and deserve. However, we understand that sometimes it is difficult to know what to ask. The below are some suggested questions that you can ***ask your potential or current Advisor:***

1. *Are you a ‘fiduciary’?*
2. *How do you charge for your services and how much?*
3. *What licenses, credentials, and other certifications do you have?*
4. *What services does your firm provide?*
5. *What types of clients do you specialize in?*
6. *Could I see a sample financial plan?*
7. *How much contact do you have with your clients?*
8. *Will I be working only with you or with a team?*
9. *What makes your client experience unique?*

Source: https://www.forbes.com/pictures/hihk45edg/1-are-you-a-fiduciary/#2579fbd97647

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We want to get to know you..

“When you talk, you are only repeating what you already know; But when you listen, you may learn something new.” – Dalai Lama

Our goal with our clients is to truly understand them. This means going well beyond net worth and income. Where we start is to try to understand their:

- *Values*
- *Experiences*
- *Philosophies*

We believe that you need to understand how you came to this point in time before we can help you move forward.