

James Lukezic Shares Tips for Finding a Financial Advisor

PALM BEACH, FL, UNITED STATES, November 25, 2019 /EINPresswire.com/ -- As the Executive Managing Director of Old Slip Capital Partners, [James Lukezic](#) has almost two decades of experience working as a retirement consultant for large corporations. He has taken on different roles serving as a financial analyst and institutional consultant for many financial corporations over the years. James Lukezic recognizes some individuals are not comfortable with the idea of hiring a financial advisor because they don't know where to start. He shares some tips for those who want to explore the idea of a financial advisor.

Familiarize Yourself with the Types of Financial Advisors

As someone who has worked in different sectors as a financial advisor, [James Lukezic recommends](#) people familiarize themselves with the different types. For example, some financial advisors might offer investment management, while others provide financial planning.

Advisors who focus on financial planning deal with helping people save and the types of insurance they might need; investment advisors focus on managing the investments of their clients. Retirement financial advisors specialize in managing sources of income during retirement, such as investments, pensions, and Social Security benefits.

Check the Credentials of Potential Financial Advisors

According to James Lukezic, one of the most important things to keep in mind when seeking a financial advisor is the credentials. Getting a reputable financial advisor is one of the most critical steps. James Lukezic advises people to verify that potential financial advisors have some of the following credentials CFP, PFS, or CFA. Even if the financial advisor has the credentials, potential clients need to double-check for complaints against the. James suggests people check the Financial Industry Regulatory Authority (FINRA) for any complaints.

Learn the Compensation Process

James Lukezic recommends people looking for a financial advisor to learn about the compensation process. Learning about the compensation process can help determine what they can afford as far as a financial advisor. In general, most financial advisors are fee-only, but others can also charge on an asset-based fee, an hourly fee, or commission fee.



Ask the Right Questions

James Lukezic suggests people ask the right questions when trying to find a financial advisor. Asking the right questions often helps people weed out advisors that won't be able to meet their needs. It's essential potential clients go prepared with questions before they meet with a possible financial analyst. Asking questions will also give clients a better sense of how the financial advisor communicates. If the advisor doesn't give you the answer they're looking for, they shouldn't be afraid to ask follow up questions.

[James Lukezic has](#) also worked with financial giants such as Merrill Lynch, Citigroup Global Markets, Wells Fargo, and Bank of America in his career. When James Lukezic is not advising large corporations, he's helping the community. James serves as the Chairman of ITF USA, a non-profit organization that assists landmine victims in over 30 countries worldwide. He also has plans to establish a non-profit to help widows in the five boroughs.

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