

E1 Asset Management Says Finding the Right Investment Professional for Today's Markets

In today's world, finding a qualified and trustworthy financial professional can be a difficult struggle.

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/EINPresswire.com/ -- The world of investing has become exceedingly more challenging than it has ever been in the past, so choosing the proper investment professional is crucial to investment success. Each individual investor is unique, so taking the time to find the proper fit is ultimately the most important factor involved in this process.



Today, there are countless numbers of choices of brokers, investment platforms, cost structures, full-service firms or discount firms, firms offering advisory or non-advisory services, and private financial planners as well. Choosing the perfect one can be a daunting task, but even a novice can make a good decision with guidance and a little effort.

The first step, and in many cases the most important one, is to understand your individual needs, wishes, and investment philosophy. Don't be afraid to take notes and build a profile so that nothing is forgotten. What is most important to you? What are your investment goals and time frame? How much will you want to invest? How concerned are you about the safety of your money and daily fluctuation? What amount of risk are you willing to take in order to gain higher returns? Your risk tolerance is extremely important, so put plenty of thought into figuring this out. Do you want to be in control of all decision-making, or do you want to depend more on your advisor and be less involved? Are you only interested in investing, or do you need other financial planning such as estate planning, tax planning, or insurance advice?

Once you have a personal profile completed, and have a good idea of what your goals are, it is time to begin looking for a financial professional. If you need full service, the very best way to

start is to contact family members and close friends or associates to get referrals. Confidence is key in this decision-making process, so having referrals from people you trust may eliminate some of the fear of dealing with strangers. When you are entrusting your savings to others, the more comfortable you feel, the better, so take any recommendations from those close to you seriously.

Regardless of which professional or firm you decide to talk with first, be prepared to ask straightforward and tough questions, and set your expectations very high. Remember, you are the interviewer, and therefore you are in charge. You are looking to hire an advisor, so make sure that your standards are met before considering anyone.

The first matter of business for any competent and financial professional is to find out as much as possible about you and your investment needs. The profile you completed initially will be very useful at this stage. The financial professional should ask many questions before any investment advice is mentioned. Normally, a good financial professional will have a detailed questionnaire so that nothing will be missed during your interview. Your risk tolerance, investment goals, time frame, retirement plans, and expectations should all be addressed in your initial meeting. You and your financial professional should be in sync, and you should feel very comfortable when discussing your personal information. Trust your instincts.

Be sure to ask hard questions about commissions and fees, and go over what will work best given your unique circumstances. There are many different fee structures and many different investment platforms today, so there should be one that is right for you.

It is vitally important to go over how you expect to be treated once you become a client. This is best settled early on, so that there is no confusion later. Do you want face-to-face meetings, and how often? Do you want calls on a regular basis, or only when your advisor feels it necessary? Ask the time policy for returning your calls. Normally, all client calls should be returned the same day or within twenty-four hours.

It is very important to keep in mind that today's investment markets are much different than in the past. Volatility and risk are heightened, and higher stress levels are more prevalent. A good financial professional can help alleviate some of the uncertainty during trying times, and help you meet your goals. FINRA provides a free tool called [BrokerCheck](#) that enables you to research brokers and brokerage firms' professional backgrounds and investment adviser firms and advisers. Your selection of a financial professional is meaningful, and choosing the right person for that job can be of great value for your future, so take the time necessary to find the right person on the first try.

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