

# Our protection adviser checklist.

Why not speak to a few financial advisers to see how they shape up? We have put together a checklist to help you with your decision...



**Are they whole of market (independent) ?**



**Do they offer initial consultation without charge?**



**Do they offer full advice and recommendation service?**



**Do they have a detailed and documented advice process?**



**Do they have a client charter and set of advice standards?**



**Are all fees fair and transparent and agreed before proceeding?**



**Are they able to accommodate your preferred meeting times?**



**Do they have professional and private offices for meetings?**



**Are they able to demonstrate a consistent pattern of satisfied clients?**

