



## A Well-Rounded Advisory Team

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A good financial advisor wears many hats in a client relationship. They might be a behavioral coach, a psychologist or a shoulder to lean on. Their most important role is serving as the “quarterback” of their respective client’s advisory team.

A well-rounded advisory team comprises the following:

Financial advisors typically play a central role in the process, focusing on your overall financial plan, and often coordinating the activities of other professionals who have expertise in specific areas.

Accountants or tax professionals provide advice on federal and state tax issues.

Estate planning attorneys help you plan your estate and give advice on transferring and managing your assets before and after your death.

Insurance professionals evaluate insurance needs and recommend appropriate products and strategies.

Investment advisors provide advice about investment options and asset allocation. They can also help you devise a strategy to efficiently manage your investment portfolio.

*The most important member of the team, however, is you. Your needs and objectives should always drive the team.*

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