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Financial Advice

by Dan Thompson, R.R.P., R.V.P.

The following is an article prepared by my nephew, Mr. Sean Sweeney, Financial Adviser for London Life. He provides valuable information on how to assimilate financial advice and what qualities to look for in a Financial Advisor.

The abundance of financial choices available to Canadians can be overwhelming, and the individual investor is well advised to seek professional guidance in selecting the right plan to fit his/her individual needs.

Here are a couple of suggestions for Canadian investors when selecting an advisor to work with: *Do they specialize in a niche market which you are a part of? (i.e. lawyer or physician)

- Have they designed a comprehensive financial security plan including retirement, liquidity, education and insurance planning for both life and disability?
- Are they a Certified Financial Planner , a Chartered Financial Consultant, or a Chartered Life Underwriter, and are they a member of the Canadian Association of Insurance and Financial Advisors?
- Can they readily provide you with client references?

Ultimately, it is the individual decision of the investor themselves to determine with whom they will work with; however, if the Financial Advisor cannot answer these simple questions you are probably better off seeking advice from someone who can.

My nephew, Mr. Sean Sweeney, can be contacted at 519-432-7523, Ext: 317 for more information.

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