



How to Select or Evaluate Your Financial Services Provider

What's the difference between a broker, an adviser and a financial planner? What do all the titles and designations mean? How can their background and credentials be checked out? What services should you insist on having provided? When interviewing a prospective financial services provider, how do you differentiate between a straight-talking professional and a flim-flam salesman?



Whether you already have a financial services provider, or are trying to select one, this course will give you the confidence to effectively evaluate your options and make the choice that's right for you. We will also cover the 15 critical questions you should ask any financial services provider about themselves, their business and their investment recommendations.

Made possible with funding from the Investor Protection Trust in Washington D.C., through the Michigan Office of Financial and Insurance Regulation, all *Investor Education In Your Community* courses are non-commercial, free from sales pitches, and available to you through your library – at no cost. Presented by an unparalleled and dynamic speaker who has instructed over 10,000 Michigan residents, you will receive quality information from a trusted source, without the worry that someone will try to 'sell' you something. It gets no better than this! Additional resources will be available onsite from GreenPath Debt Solutions and MSU Extension. Course time: 1 hour.

Attendance is free, but space is limited. Register with your library today.
