How Do Smart, Savvy People Wind Up Choosing Such Bad Financial Advisors?

Caledon, ON - Retirees (and those contemplating retirement) risk being the victim of bad advice and it has a lot to do with their own lack of knowledge. "It's so sad to listen to the stories, and how they inadvertently created a financial mess for their families." remarks Scott Plaskett, CFP and Senior Financial Planner & CEO of the local financial planning firm, IRONSHIELD Financial Planning.

After unfortunate and sometimes financially damaging experiences with previous financial advisors (expressing their frustration with a planner's customer service, their losses while using their planner's strategy, and their anger that the situation had gone on for so long unchecked), retirees are angry that they had allowed this to happen to them.

"I couldn't see how they could have avoided it." remarks Plaskett.

Often times these couples had frequently checked out the advisor's credentials and recommendations, had had initial meetings that seemed legitimate, and had often entrusted their finances to this person for many years before discovering they weren't getting anywhere.

So what went wrong?

How did smart, savvy people wind up choosing such bad financial advisors?

If common sense could have saved them, it would have. "These people don't lack for intelligence or discernment." says Plaskett. **"They had often chosen wisely for other trusted advisors like accountants or lawyers."**

What they did lack – which was finally discovered – was a specific set of *requirements* for a financial planner.

A financial planner isn't like any other profession. You can rely to a certain degree on other people's recommendations, but at a certain point you have to put your finances in this person's hands and operate on blind faith.

It's pretty hard to pick out the good planners from the bad ones when you don't know what a good plan or a bad plan looks like.

After all, if you could identify the best financial plan yourself, you wouldn't need the advisor in the first place.

What most people don't know is that there are ways to find a good financial planner - even if you aren't an expert. There are certain clues to look for, smart questions to ask, and early indicators that the financial planner is on your side - or not.

"I wanted to make sure everyone had that knowledge" states Plaskett. So he created a consumer awareness guide to help find, interview, and choose a Certified Financial Planner you can trust. **This guide includes the red flags and deal-breakers that should immediately warn you off of a bad choice.**

The guide is published through Amazon.com specifically for Canadians.

For a limited time a free downloadable copy is being made available to help get the word out.

Please read this guide carefully, and use it in your search. I sincerely hope it guides you to the best financial planner for you.

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