

## Desired Relationship With Your Advisor

The four scales below will help you identify your preferences for working with a wealth manager. Choose a dot on each scale indicating your preference along the spectrum. For example, on Length of Relationship, if you prefer to work with a wealth manager year-after-year, you would put a dot on the right side of the scale. Please note the pattern of dots on the four scales and how they relate to the type of wealth manager as shown in the graphic at the bottom of the page. For example, dots on the left side would indicate a commissioned agent or hourly advisor might best meet your needs.

### Length of Relationship

One-time engagement

Ongoing oversight and monitoring

### Frequency of Interaction

I reach out for assistance as needed

Advisor contacts me on regular basis with ideas and updates

### Service Approach

Expert in a specific discipline  
(insurance, wills, investments, etc.)

Oversight of entire situation and  
brings in specialists as needed

### Implementation

Self implementation

Advisor implements  
on my behalf

## TYPES OF WEALTH MANAGERS

