

The 4 Key Traits of a Truly Great Financial Planner

Some people hear about the services of professional financial planners and think planning for the future isn't something they need to worry about yet. However, professional financial advice isn't just for the future - it can help you save money, pay less tax, grow your assets, protect your income, and build your investment portfolio today. As you near retirement, you'll find that your home is paid off sooner, your super balance is bursting, you've paid less tax, and you've given your kids the head-start you wish you'd had.

In a nutshell, it's all win if you jump onto the financial planner train. But how do you know that your financial planner is worth their weight in gold? Here are the traits and features to watch out for when browsing your options:

1. They have a great reputation

Anyone can big themselves up - the key here is word-of-mouth referrals. If the claims sound too good to be true and there's not much to back them up, skip to your next option.

2. They are pro-active & inspire trust

If you're waiting for a reply from your prospective financial planner, why would those wait times be any different when you engage them? But great communication is not everything; once you do get in touch, a great planner will turn complex concepts into a language you can understand. If your planner seems frustrated by your questions, or you're hassling them just to get back to you, move on.

3. They won't panic

There's something about planning in general: it's a calm process. Often, a financial issue may be ripe ground for some serious panic stations - but when things go wrong, a great financial planner will simply lay out your options for getting out of the pickle. And if they're really worth their salt, the strategic plan will be so well thought out that panicking is something that is never even a possibility.

4. They understand you

Some financial planners are all "me, me, me". Professional financial advice is exclusively about YOU. What that means is that your planner needs to take the time required to understand you: Your income, your assets, your situation, your spending, your debt - your goals. Only by really getting to know you will the best financial planners be able to develop the most meaningful and fulfilling strategy.

But that's not all! Great financial advisers also have equally great support teams, contacts and colleagues, and ensure that the only way they really get ahead in the game is by delivering amazing results for you.

Do you have great financial advice? Why not get in touch today to talk about how it could transform your life today - and unfurl your wildest dreams for the future.