



*it's time to conquer your money*

## ELEVATE FINANCIAL STRATEGIES

### 5 things that define a great relationship with your financial advisor:

- 1.** Do you feel heard? Advisors are there to provide custom planning for you, not at you. Make sure your advisor listens to your particular hopes, fears and dreams, and plans accordingly.
- 2.** Are they available for you? If you only want to speak with your advisor once a year and that's what you get, terrific. However life is rarely static, so make sure your Advisor is available to answer questions, give advice and address any big changes in a timely manner. Because life happens, and it matters.
- 3.** Do they care about you? This goes back to being heard – your financial advisor is giving you extremely important advice, which should be tailored to you and your unique situation. If you have to remind them who you are each time you call, you may want to look around for someone a little more invested in you.
- 4.** Do they collaborate with the rest of your professional team? Working with your lawyers and accountants or bookkeepers is a great way to ensure your entire financial picture is understood by all – it's hard to have everyone working toward your vision if they aren't all on the same page.
- 5.** Finally, how do you feel after your conversations? If you leave a meeting feeling overwhelmed, uncertain of the language used or unclear on your financial position or goals, trust your instincts. They might be a great advisor, but if you leave feeling like you did after a bad first date, it might be time to look for someone who suits you better. paid by employees, it's a cost-effective way to demonstrate care for them and their family's financial stability in the face of an illness or injury.

**For more information or to arrange a free consultation, contact:  
Ellen Covey at 587.222.6050 or [hello@elevate.finance](mailto:hello@elevate.finance) today!**

