Wealth Advisor Selector Questionnaire

How do you rate your advisor?

1. What special qualifications and experience does your advisor have?

The Latremoille Group

- ☐ 30 years industry experience
- ☐ IDA Award of Distinction
- ☐ MBA, CIM, FCSI
- ☐ Insurance License, Levels I & II
- ☐ Portfolio Manager
- ☐ ICD.D Institute of Corporate Directors
- ☐ Author of 3 books

2. What does your advisor do that is different from others, that makes you want to work with them?

The Latremoille Group

- ☐ Integrated approach (tax, estate, insurance, succession, charitable giving)
- ☐ Proactive work with your other key advisors
- ☐ Team approach with high staff to client ratio
- ☐ Individually customized solutions, portfolio, and reporting

3. What can I expect for reporting and servicing?

The Latremoille Group

- ☐ Quarterly summary reports, monthly account activity reports, and 24/7 online account access
- ☐ Excellent service tailored to your needs
- ☐ Regular customized progress reviews

4. What results/returns do I expect?

The Latremoille Group

- ☐ Our process ensures that returns are matched to your risk tolerance, time-horizon, and objectives

5. What does your advisor charge and how much can you expect to pay?

The Latremoille Group

- ☐ All inclusive

- ☐ Fully-disclosed
- ☐ Transparent
- ☐ Competitive fees reflecting your individual needs

6. What size of practice does your advisor manage?

The Latremoille Group

- ☐ 100 families and $300 million under management

7. What is the typical client size for your advisor?

The Latremoille Group

- ☐ Clients range in size from $2 million to $50 million in assets under management

8. Does your advisor have a team? If so, what size?

The Latremoille Group

- ☐ Five professional, long-term team members
- ☐ All the resources of Richardson GMP Financial Limited – investment strategists and wealth planning experts (e.g. certified financial planners, insurance specialists, and estate planners)