

YOUR WEALTH ADVISOR SELECTOR™ QUESTIONNAIRE



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This questionnaire will help you to gather information and evaluate prospective advisors. As you interview each advisor, ask these key questions, then compare the answers to select the best advisor for you.

Advisor 2

Advisor 3

What special qualifications and experience do you have?

The Latremaille Group	Advisor 2	Advisor 3
<input checked="" type="checkbox"/> 30 years industry experience
<input checked="" type="checkbox"/> IDA Award of Distinction
<input checked="" type="checkbox"/> MBA, CIM, FSCI
<input checked="" type="checkbox"/> Insurance License, Levels I & II
<input checked="" type="checkbox"/> Portfolio Manager
<input checked="" type="checkbox"/> Author of three books
<input checked="" type="checkbox"/> Scored an aggregate total of 4.9 out of 5

What do you do that is different from other advisors so that I should work with you?

The Latremaille Group	Advisor 2	Advisor 3
<input checked="" type="checkbox"/> Team approach with high staff to client ratio
<input checked="" type="checkbox"/> Individually customized solutions, portfolio, and reporting
<input checked="" type="checkbox"/> All market resources available
<input checked="" type="checkbox"/> Holistic and integrated approach (tax, estate, insurance, succession, charitable giving)
<input checked="" type="checkbox"/> Proactive work with your other key advisors

What level of service can I expect?

The Latremaille Group	Advisor 2	Advisor 3
<input checked="" type="checkbox"/> Regular customized progress reviews
<input checked="" type="checkbox"/> Prompt response to phone calls and emails
<input checked="" type="checkbox"/> Quarterly summary reports, monthly account activity reports, and 24/7 online account access



What about results / returns?

The Latremoille Group

Advisor 2

Advisor 3

- Our process ensures that return expectations are matched to your risk tolerance, time horizon, and objectives
- Guidance through different periods in the financial market

How do you charge and how much can I expect to pay?

The Latremoille Group

Advisor 2

Advisor 3

- All inclusive, fully-disclosed, competitive fees reflecting your individual needs and industry norms

How many clients do you have and what are your total assets under management?

The Latremoille Group

Advisor 2

Advisor 3

- 100 families and over \$500 million in assets

What is your typical client size?

The Latremoille Group

Advisor 2

Advisor 3

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

Do you have a team? If so, what size?

The Latremoille Group

Advisor 2

Advisor 3

- Yes — six professional, long term team members, plus all the resources of Richardson GMP



CONTACT US

We understand your needs and are dedicated to serving them with distinction. In all we do, we strive to reward our clients for placing their trust in us.

Live life. On your terms.

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