ENTRUST FINANCIAL'S SECOND OPINION SERVICE

Markets are volatile, media entertainment (a/k/a news) is always hounding investors about "where to invest now," and global uncertainty abounds. No wonder investors second-guess their decisions and fear their money is not working for them as it should.

We designed our Second Opinion Service to help concerned investors make informed decisions about their personal finances and investments. It works something like this:

- We schedule a meeting to discover where the investor is now, where they want to be and to identify gaps that may exist.
- If all is well, we let the investor know. If working with us makes sense we begin that process. If another advisor would be better fit, we point them in the right direction.

Do you need a Second Opinion about your wealth planning? The following questions will help you decide:

1. Do you feel confident when you think about your investments?
2. Are you certain you are making the right decisions about your money?
3. Is your financial advisor helping you achieve your most important goals?
4. Do you know your retirement number?
5. Have you prepared for the unexpected?
6. Are you confident you understand the asset allocation of your inherited portfolio?
7. Do you feel that all the complexity of your financial situation is under control?
8. Have you nailed down the exit strategy from your business?
9. Are you protected and secure with respect to your finances, now and into the future?

If you felt uncertainty while answering any of these questions, a Second Opinion might be just what you need to dispel your concerns about keeping your money on track. To begin your complimentary conversation, contact our team: contactus@entrustfinancial.com

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