Second Opinion Service

Money can serve our values and help us live well, but if not allocated astutely, a nest egg may fall short of expectations. Therefore, it is not surprising that investors at times second-guess their decisions and fear their money is not working for them as it should.

Our Entrust Financial team 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.

The following questions can help you decide if you need a Second Opinion about your investment management and wealth planning:

1. Do you feel confident when you think about your money?
2. Are you certain you are making the right decisions about your investments?
3. Do you feel that your financial decisions align with your values?
4. Is your current financial advisor helping you achieve your most important goals?
5. Are you on track with your business succession planning?
6. Do you have a clearly articulated strategy to preserve your family wealth and legacy?
7. Do you feel protected and financially secure, now and into the future?

If you experienced some uncertainty while answering any of these questions, Entrust's Second Opinion Service might be just what you need to dispel your concerns about keeping your financial life on track.

To begin your complimentary conversation, simply contact us today.

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