

Checking before selecting.

Reference check questions to ask before hiring a financial adviser.

Adviser's details.

Name	
Phone	
Practice Info	

Referee feedback.

How long did you work / have you worked with [Financial Adviser's name]?
What service did / does [Financial Adviser's name] provide for you?
How did / do you find their financial planning service and support?
How did / do you find their review / ongoing support?
Can you tell me about their best skills or attributes?

What's something [Financial Adviser's name] could do differently / better?

Did you ever encounter any issues with the technical advice or service from [Financial Adviser's name]?

Do you have any ethical concerns with [Financial Adviser's name]?

Would you recommend [Financial Adviser's name] to your best friend?

Is there anything else I should know before I appoint [Financial Adviser's name] as my adviser?

Final checks

ASIC Authorised Representative Number	AR Number: <input type="checkbox"/> Enter AR Number into the Financial Advisers Register and confirm background information matches details on the FAR
FSG & Profile	<input type="checkbox"/> Confirm you've received the Adviser's Financial Services Guide (FSG) / Adviser Profile
Final Decision	<input type="checkbox"/> Appoint Adviser <input type="checkbox"/> Revisit / Book follow up discussion with Adviser <input type="checkbox"/> Do not appoint Adviser
Notes	