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How do I find good
advisors such as
lawyers and
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RAYMOND JAMES®

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To run your business successfully, you may need advice in a number of diverse areas such as financial planning, accounting, law, taxation, insurance, and investment management. For this you may have to hire one or more advisors. Before you hire an advisor, however, it is important to understand your needs, because a well-chosen advisor can point your business in the right direction and help you pursue your goals.

When looking for a particular advisor, start with a referral from someone you have worked with previously or from colleagues you respect. If that doesn't work, call a local referral agency or local professional association. Other options include the Internet and advertisements in the local media.

Before your initial meeting with the advisor, prepare a list of questions and topics you wish to discuss. Topics you may choose to cover include the advisor's experience, education, credentials, licenses, area of specialization, and references. After your initial meeting with the advisor, evaluate the meeting. Ask yourself the following questions:

- Did the advisor listen to you?
- Did the advisor understand your situation completely?
- Does the advisor work with other people in your business?
- Did the advisor make any suggestions or offer any advice?
- Is the advisor willing to work with other advisors?
- Did you feel comfortable with the advisor?
- Do the advisor's fees work within your budget?

If you're satisfied with the answers, you may have identified someone to help you with your business.

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