



5 Critical Questions to Ask Before Any Financial Decision

1. Have you adequately reviewed my personal financial situation to make sure this recommendation is in my best interest?
2. How will your plan affect my tax return each year and what future tax issues may concern me?
3. How will your plan affect my income and liquidity needs in the future?
4. How does your plan match up with my risk comfort level?
5. How will your plan affect the transition of my estate to my heirs?

If you did not ask these questions before, it is a good indicator that you were making decisions without a process that will help you identify the critical facts you need to make logical financial decisions and you should go through further discovery and review. **Please call Raymond at 586.464.4130 to schedule a time for your no obligation 3-step review** or for more information enter your request at <http://www.acceleratedwealthadvisors.com/offices/sterling-heights-michigan/raymondbackers/> to be contacted.