



an investor's guide to finding your right-fit advisor

Our hope is that you find the best-fit advisor for you, and we realize that might not be us. So we wanted to provide you this guide to help you search.

does your advisor come highly recommended?

We suggest you look up the advisor on google and yelp and read their reviews. Is the advisor endorsed, or recommended by someone you trust? You can check out the companies' Facebook pages to see if you have any friends in common and reach out to them to learn their personal experience.

We come highly recommended by our clients who gave us a 99% satisfaction rating, 5-star Google reviews, 5-star yelp reviews, and voted us Around Woodstock's favorite Financial Advisor for 3 years in a row. We are endorsed by Dave Ramsey as well.

is it the right time to hire a professional?

The best time to invest is when you have money. We recommend that you are debt-free and have an emergency fund before you contribute, however we're able to help you manage your existing assets, even if you are still working towards those goals.

Reminder! Take it slow. This is a big decision. Meet with your potential advisor as many times as you need to feel comfortable.

can you envision a long-term future with this advisor?

Think about your long-term family goals. Will the advisor help you achieve these?

Our ideal client is a family we can impact for generations. We even have several three-generation client households where the parents, grandparents and children have all individually engaged our firm.

leading people to financial peace, independence + generosity

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does your advisor have the heart of a teacher?

The right-fit advisor should be able to explain their services and investment options in a way you can understand.

Each of our advisors has a personal mission to help you learn and grow. We are transparent in our communication and truly want the best for you.

do your values align?

Ensure that the values of the advisor line up with your values. Do they value the same things when it comes to money habits, investments, and planning for the future?

We value being debt free, contributing 15% of your income toward retirement, generosity, and generational legacy.

can the advisor help you achieve your objectives?

Clearly identify the problems you want your advisor to help you solve. Most advisors are quick to offer new investment options, but if you need confidence you can retire and that your money will outlive you, then you need to ensure your advisor can provide the right level of comprehensive planning to provide the confidence you need.

We pride ourselves on providing guidance, relationship, and creativity when it comes to our clients' financial concerns.

how is the advisor paid?

Their financial incentives should be aligned with your best interest. The advisor should be transparent about how they're being paid.

We are fee-only advisors--paid a percentage of assets under management--with no commission and are always transparent about our fees.

does your advisor lead by example?

Look for an advisor who has integrity and character--someone who is practicing the same money habits that they recommend for you.

Our mission is to lead people to financial peace, independence, and generosity. When we are advising our clients to invest a certain way or have certain habits with money, we personally employ the same investments and money habits.

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do you want a team on your side?

Discover if you're looking for one person or a team of people--is the advice limited to your advisor and the money they manage? Or do you want a team of people working together for you.

At GIA, we work as a unique ability team. Our clients' access to knowledge and expertise is not limited to their advisor, but it extends to our whole team. Our comprehensive financial planning covers not just our clients' investments with us but everything that would contribute to their income and net worth.

does your advisor communicate on your preferred channels?

How do you want your advisor to communicate with you? And, how often?

At GIA, we communicate through in-person meetings, phone calls, texts, monthly insider guides, weekly blogs, videos and social posts on Twitter, Facebook, Instagram, YouTube, LinkedIn, Google My Business, and send co-branded weekly market updates with Barron's.

We also make it easy to do business with us virtually; documents are available to be signed electronically, and we can connect through video conferencing calls, if preferred.

are you ready to give us a chance?

[click to schedule an intro call](#)

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