



QUESTIONS TO ASK WHEN INTERVIEWING A PLANNING FIRM

1. Is your planning process overtly Christian and do you plan from a biblical worldview?
2. How many families do you do planning for annually?
3. How many families have you worked with who have a net worth equal to or higher than ours?
4. May we talk with three of those families for whom you have implemented plans?
5. Will we be working directly with the President and CEO of your firm?
6. How much time do you devote to getting to know us and our situation before you start planning?
7. How long will it take to go through your planning process?
8. How much personal time will you spend with us in the planning process?
9. Will you conduct family meetings to help us communicate our plans to our heirs and help us prepare them for their inheritance?
10. Do you work with our existing advisors or will we work with you in place of our current advisors?
11. Once the plan you design for us is implemented, what are your on-going services to help us keep the plan current?
12. How do you handle future (life or financial) changes that will require maintenance on or modifications to our plan?
13. How do you get paid?

ABOUT THE AUTHOR — E. G. “JAY” LINK

Jay Link, Director of Stewardship Planning at Taylor University, spent 35 years counseling Christian families to build customized Master Stewardship Plans. He is an author, a mentor to hundreds of financial advisors and attorneys, and started his career as a pastor. His passion is helping Christian families use all the Lord has entrusted to them for Kingdom-building purposes.