Advisor Evaluation Checklist

When choosing an advisor to help you prepare for your financial future, it's important to partner with one who has experience with your unique situation and benefits, can provide guidance during every stage of your career and will assist your family members and loved ones should something happen to you. As you evaluate potential advisors, or take another look at your current advisor, be sure to consider the following features and services.

	RAA	Your Advisor
Ongoing Features and Services:		
401(k) Professional Investment Management and/or Retirement Wealth Management	✓	
Over 50 Portfolios Available Based on Individual Needs	✓	
No Transaction Fees	✓	
Airline & Military Benefits Guidance	✓	
Estate Planning Guidance[1]	✓	
Tax Return Preparation and Planning[2]	✓	
Survivor Assistance	✓	
Insurance Guidance	✓	
Risk Tolerance Analysis	✓	
Client & Family Advisory Councils	✓	
Family Fee Advantage Program	✓	
New Hire Features and Services:		
New Contract Guidance	✓	
Benefit Selection Guidance	✓	
Mid-Career Features and Services:		
College Planning	✓	
Divorce Planning	✓	
Multi-Generational Planning	✓	
Right Seat to Left Seat Guidance	✓	
PBGC Advice	✓	
Distribution Planning HSA and/or RHA VEBA Recommendations	✓	
HSA and/or RHA VEBA Recommendations	✓	
Retirement Features and Services:		
Social Security Guidance	✓	
Medicare Guidance	✓	
Long-Term Care Consulting	✓	
Required Minimum Distributions	✓	

Are you ready to learn more?

RAA, Allworth Financial's airline division, has successfully helped thousands of airline families reach their financial goals, and we would like to do the same for you. Request a call with a certified advisor to find out how our airline benefits experience and comprehensive approach to financial planning can help you achieve a secure financial future. Request a call today at **RAA.com/AdvisorCall**

 [1]RAA is not a law firm and does not give legal advice. [2]RAA is not a CPA firm, meaning we cannot offer non-related tax services such as bookkeeping services, business financial statement preparation, nor auditing services.