

The value of a financial advisor

Six reasons why having a financial advisor is a smart investment

In today's complicated global economy, the right path to reaching your goals can often be difficult to see and follow on your own. A financial advisor can be a trusted partner, offering value in numerous ways:



1

Knowledge



- Has expertise in a range of investing strategies and products to help guide your investment decisions
- Stays up-to-date on the latest financial trends, strategies and market performance so you don't have to

2

Advice



- Offers financial advice you can understand, whether you're a sophisticated investor or just starting out
- Brings a balanced perspective so you can make a confident decision each step of the way

3

Skill



- Has the resources and tools to successfully execute your financial strategies
- Closely monitors national and global markets – adjusting your financial plan to respond to changing market conditions if required



Perspective

4

- Presents products, services and opportunities tailored to your goals, risk tolerance and interests
- Takes the emotion out of investing by helping you stay focused on your financial goals



Attention

5

- Takes the time to listen and understand your needs, goals and aspirations to build a financial plan that's right for you
- Regularly checks in with you to ensure your financial strategy continues to align with your life circumstances



Commitment

6

- Supports you and your family at all stages of your life
- Considers and anticipates your future financial needs giving you peace of mind

To learn more about which B2B Bank products and services are right for you, speak with your financial advisor. For day-to-day inquiries about your B2B Bank accounts, speak with one of our Client Services Representatives at **1.800.263.8349**.

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