
















# INTERVIEW *guide*

ramseysolutions.com/smartvestor

- 1 Schedule a call to interview each pro and ask the questions below (take notes so you can compare their answers).
- 2 Think about your overall impression of each pro and fill in the facial expression that represents your feelings.
- 3 Make your final pick and let the pro know you're ready to get to work.

SMARTVESTOR PRO NAME					
PHONE NUMBER	( ) / /	( ) / /	( ) / /	( ) / /	( ) / /
DATE OF CALL					
What type of <u>qualifications</u> do you have?					
What <u>services</u> do you offer?					
What's your investment philosophy?					
What <u>differentiates</u> you from the other investing pros?					
Can you help me understand how you get paid?					
How will you keep track of my investment <u>performance</u> ?					
ADDITIONAL NOTES					
OVERALL IMPRESSION	  	  	  	  	  
FINAL PICK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>