



Finding Local Financial Planners

The purpose of this document is to help congregants select an appropriate financial advisor or check to see if your current financial advisor has the appropriate knowledge and certifications to give sound financial advice.

It is important that you select a financial advisor that is educated, experienced and ethical. This link identifies 10 considerations in choosing a financial advisor:

<http://www.designationcheck.com/considerations-for-choosing-an-advisor>

If you do not have a financial advisor it is important to do research on potential advisors to see if they follow industry best practices. Here is a link that explains the various types of certifications that are available to financial advisors: <http://www.designationcheck.com/learn-more-about-credentials>. It is also important to ask what fees the financial advisor will charge you for your services.

The Lincoln Unitarian Foundation and the Unitarian Church of Lincoln are not endorsing any financial advisor listed on the websites below. Individuals need to use available resources ask appropriate questions to secure a financial adviser that you are comfortable with. You may also talk to friends or family members on the financial advisors they use.

A listing of local Chartered Financial Consultants (ChFC) and Chartered Advisor in Philanthropy (CAP) use this website: <http://www.designationcheck.com/advisor-search>. It is best if you go to the bottom of the page in the “Verify Professional Credentials: Full List of Designees in Good Standing” section to obtain a full listing for you zip code.

To find local Certified Financial Planners (CFP) go to: www.LetsMakeAPlan.org