

# 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.

<b>SMARTVESTOR PRO NAME</b>				
<b>PHONE NUMBER</b>	( )	( )	( )	( )
<b>DATE OF CALL</b>	/ /	/ /	/ /	/ /
What type of <u>qualifications</u> do you have?				
What <u>services</u> do you offer?				
What's your <u>investment philosophy</u> ?				
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> ?				
<b>ADDITIONAL NOTES</b>				
<b>OVERALL IMPRESSION</b>	😊 😐 😞	😊 😐 😞	😊 😐 😞	😊 😐 😞
<b>FINAL PICK</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>