

Housing

Health

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About Us

Senior Housing

Find a Living Facility
Independent Living
Assisted Living Facilities
Nursing Homes
Home Care
Board and Care Homes
Alzheimer's and Dementia Care
Continuing Care
Living Abroad
Reverse Mortgages

Health & Nutrition

Senior Finance

Travel & Mobility

Insurance for Seniors

"I found the information here to be more valuable than on some other sites that were more self-serving. You showed me what to look for to get good advice about my investments."

-William J.

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Senior Finances



How to Find A Good Investment Advisor

Whatever your plans are for [retirement](#) in order to ensure you have the quality of life you want for yourself, you should consider discussing your goals with a qualified retirement investment advisor. This individual can offer investment advice that can have a significant impact on your lifestyle after you enter retirement. Your investment advisor will be able to help you forecast how much money you will have available each year based on projections about rate of return at which your assets grow, pace of inflation and your own personal spending habits.

To find a retirement advisor, you can check with brokerage firms. They generally list the investment advisors they work with and provide information about their performance. You also can subscribe to one of the numerous database services that include information, and sometimes rankings, on investment advisors.

Financial Planners Vs. Investment Advisors

In evaluating prospective senior investment advisors, consider the services you need and in turn what services the advisor can deliver. There is, for example, a difference between a financial planner and an investment advisor. Whereas, most financial planners are investment advisors, not all investment advisers are financial planners. Some financial planners will assess every aspect of your finances in order to recommend a strategy or plan to [meet your financial goals](#). Others call themselves financial planners, but they may only be able to recommend that you invest in a narrow range of products, and sometimes products that aren't securities.

Depending on their size, investment advisers have to register with either the SEC or the state securities agency where they have their principal place of business.

Question to Ask

The chief questions you'll want to ask a prospective senior investment include:

- What experience do you have advising seniors about their retirement finances and goals? How long have you been practicing?
- What licenses do you hold? Are you registered with the SEC, a state, or FINRA (Financial Industry Regulatory Authority)?
- What products and services do you offer?
- How are you paid for your services – fee or broker commission?
- Have you ever been disciplined by any government regulator for unethical or improper conduct or been sued by a client who was not happy with the work you did?
- What references can you provide?

Most Popular Articles

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Costs by State

Use our interactive Cost Finder to see how much you'd pay for Assisted Living, Home Health Aides, Nursing Homes, and more.
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Senior Living News

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- Miami Senior Housing
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- New York Senior Housing
- Philadelphia Senior Housing
- Phoenix Senior Housing
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- St. Louis Senior Housing
- San Francisco Senior Housing
- Seattle Senior Housing
- Tulsa Senior Housing
- Washington, D.C., Senior Housing

Senior Care Options by State

- | | | | | |
|---------------------------|-------------------------|-----------------------------|------------------------------|-----------------------------|
| Alabama Senior Living | Hawaii Senior Living | Massachusetts Senior Living | New Mexico Senior Living | South Dakota Senior Living |
| Alaska Senior Living | Idaho Senior Living | Michigan Senior Living | New York Senior Living | Tennessee Senior Living |
| Arizona Senior Living | Illinois Senior Living | Minnesota Senior Living | North Carolina Senior Living | Texas Senior Living |
| Arkansas Senior Living | Indiana Senior Living | Mississippi Senior Living | North Dakota Senior Living | Utah Senior Living |
| California Senior Living | Iowa Senior Living | Missouri Senior Living | Ohio Senior Living | Vermont Senior Living |
| Colorado Senior Living | Kansas Senior Living | Montana Senior Living | Oklahoma Senior Living | Virginia Senior Living |
| Connecticut Senior Living | Kentucky Senior Living | Nebraska Senior Living | Oregon Senior Living | Washington Senior Living |
| Delaware Senior Living | Louisiana Senior Living | Nevada Senior Living | Pennsylvania Senior Living | West Virginia Senior Living |
| Florida Senior Living | Maine Senior Living | New Hampshire Senior Living | Rhode Island Senior Living | Wisconsin Senior Living |
| Georgia Senior Living | Maryland Senior Living | New Jersey Senior Living | South Carolina Senior Living | Wyoming Senior Living |

Types of Senior Housing and Senior Living include: Assisted Living, Independent Living, Alzheimer's & Dementia Care, Nursing Care, Home Care, Adult Day Care, Continuing Care, and Respite Care. These terms are the ones most commonly used in the United States. However, they may vary in your area. When considering a particular facility or service provider, be sure to confirm the specific services they offer. We also strongly encourage you to make personal visits.

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