

Proverbs 3:9-10

*"Honor the Lord with your wealth and with the first fruits of all your produce then your barns will be filled with plenty and your vats will be bursting with wine."*

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GREG CARROLL

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1. TELL ME ABOUT YOUR EXPERIENCE AS AN INVESTMENT PROFESSIONAL. WHY DID YOU CHOOSE THIS PROFESSION? WHAT DO YOU LOVE ABOUT IT?
  2. HOW LONG HAVE YOU DONE THIS TYPE OF WORK?
  3. DESCRIBE YOUR INVESTMENT PHILOSOPHY. WHAT DO YOU THINK IS BEST FOR YOUR CLIENTS?
  4. WHAT IS YOUR OUTLOOK ON CUSTOMER SERVICE? IF I HAD A NEED OR QUESTIONS, WOULD I HAVE ACCESS TO YOU FOR QUESTIONS? HOW OFTEN WOULD I BE ABLE TO COMMUNICATE WITH YOU?
  5. HAVE YOU HEARD OF DAVE RAMSEY? WHAT DO YOU THINK OF HIS APPROACH TO DEBT, EMERGENCY SAVINGS AND INVESTMENT?
  6. HOW ARE YOU COMPENSATED?
  7. HOW DO YOU EDUCATE YOUR CLIENTS ON THE INVESTMENTS YOU REPRESENT?
  8. HOW WILL YOU MEASURE AND EVALUATE MY INVESTMENT PERFORMANCE?
  9. CAN YOU TELL ME WHY YOU STOPPED WORKING WITH YOUR LAST TWO CLIENTS?
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