

Investment Broker/Advisor Comparison

When selecting a broker/advisor, consider all the key factors and use the following worksheet to make a comparison.

	Alternative #1	Alternative #2
Broker/Advisor's Name	_____	_____
Organization	_____	_____
Address	_____	_____
Phone	_____	_____
Years of experience	_____	_____
Education	_____	_____
Specialization	_____	_____
Certifications	_____	_____
Professional affiliations	_____	_____
On-line trading	Yes (<input type="checkbox"/>) No (<input type="checkbox"/>)	Yes (<input type="checkbox"/>) No (<input type="checkbox"/>)
Commission on 100 shares at \$50/share	_____	_____
Fees for other investments:		
Corporate bonds	_____	_____
Mutual funds	_____	_____
Stock	_____	_____
Other fees:		
Annual account fee	_____	_____
Inactivity fee	_____	_____
Other	_____	_____
Comments:		

Material provided by Michael P. Griffin.