Questions

	marietta INVESTMENT PARTNERS	Other Advisors
Are you a Registered Investment Advisor (RIA)?	✓	☐
Are you a fiduciary?	✓	☐
Will I have direct access to every person making investment decisions?	✓	☐
Can you create a portfolio that reflects my values?	✓	☐
Is there a dedicated team that will be familiar with my account beyond one advisor?	✓	☐
Can I choose my custodian?	✓	☐
Are my assets held at a different company than my investment advisor?	✓	☐
Do you work to minimize taxes?	✓	☐
Do you write original market commentary?	✓	☐
Will you collaborate with my existing professional advisors (accountants, attorneys, etc.) to serve my needs?	✓	☐
Are you independent from big banks and large financial institutions?	✓	☐
Will you work with my family to ensure a smooth transfer of wealth to the next generation?	✓	☐
Is your firm employee-owned and operated?	✓	☐
Is my effective fee higher because you use costly mutual funds and outside managers?	✗	☐
Do you charge extra for a financial plan?	✗	☐
Has your firm been penalized by the SEC or another regulator?	✗	☐
Does your firm have outside shareholders?	✗	☐
Do you make money in any way besides management fees?	✗	☐