



Worksheet 063 – Choosing a financial advisor with Jason Cook

Investing in property is a major decision.

It can have huge implications for you and your business going forward.

A sound investment strategy can reap big benefits.

But if you don't do it right it could cost you your livelihood.

That's why we invited [Jason Cook](#) to join us for this edition of the show.

Jason works as a financial advisor with [WB Financial](#) and is the author of the book [Bulletproof Business](#).

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Get your house in order first

Jason feels strongly that people should invest with an end goal in mind.

Not many people actually make that plan.

The process of starting an investment portfolio should begin before you ever meet with your advisor.

You need to understand your cash flow, your expenses and have a monthly budget worked out.

Car repairs, house renovations and the upcoming vacation all need to be priced out.

A lot of people think that they don't have enough money to invest.

As long as you have an income you can invest!



What is your monthly budget?

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Know your goals

Investing in property or shares is not your end goal.

It's what those things will ultimately be able to provide in the future.

That might be the ability to take a lengthy vacation every year.

Or you may want to save to provide a comfortable retirement.

Maybe you want to leave more for your kids.

Not many people actually make that plan.

It's all about what the investment can do for you.



What are your long-term investment goals?

BusinessLegal : Lifecycle

Learn more by ordering the book

Whether you want to have a large company or a small lifestyle business, you must pay attention to the legal aspects right from the start.

The Business Legal Lifecycle is a handbook for you to use in your business on a regular basis.

The key areas that Jeremy Streten covers in the Business Legal Lifecycle are:

How to successfully set up your business

Why and when you need to pay attention to the legal aspects of your business

Who you should consult with along your business journey



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