



Top 10 Mistakes Financial Planners Make When Hiring

1. No strategic plan/end goal
2. Lack of clarity around role
3. Starting too late/off cycle timing
4. No standard interview process
5. Too rigid on qualifications
6. Not having candidate demonstrate abilities upfront
7. Noncompetitive comp package/offer
8. Failing to convey expectations properly
9. Little to no formal training
10. Set it and forget it