**Steps On How To Choose An Investment Planner In Mumbai**

An investment planner is as important to an investor as is a business firm. Every successful business is in need of thorough funding from outside, which is usually accomplished with the help of an investment planner. The individual not only provides the necessary financial support and advises but also forms a promising pillar and boosts the overall growth of the business firm. However, he/she might not always turn out to be supportive and kind. Therefore, choosing the right person with whom you can trust the future growth of your company is very important. Hence, here we have listed the vital steps for choosing the [**best investment planner in Mumbai**](https://www.google.com/search?q=best+investment+planner+mumbai&npsic=0&rflfq=1&rlha=0&rllag=19104837,72901324,9396&tbm=lcl&ved=0ahUKEwjAntnFgJHbAhVKLo8KHajqBYQQjGoIZA&tbs=lrf:!2m1!1e2!2m1!1e3!3sIAE,lf:1,lf_ui:2&rldoc=1#rlfi=hd:;si:;mv:!1m3!1d137659.24291801805!2d72.9203974!3d19.0423485!2m3!1f0!2f0!3f0!3m2!1i161!2i219!4f13.1;tbs:lrf:!2m1!1e2!2m1!1e3!3sIAE,lf:1,lf_ui:2) which will undoubtedly help in the growth of your financial career:

* **Understand Your Requirements**

Before choosing the **best investment planner in Mumbai**, you should first evaluate the basic requirements of your company. Understand the benefits you want for yourself and the risks you would want to take for this purpose. Invest as much as time as it takes but make sure you reach a finite decision.

* **Qualification, Experience, And License**

As an entrepreneur with a vision of sheer success, you would definitely not want to surrender the weight of your dreams to the hands of someone who is not appropriate for the position. Hence, after listing down the requirements mark suitable qualifications and designations which ensures a strategic approach towards the post. Also, check for his past working experience in the companies he had served prior to this. Remember, a goldsmith learns by the number of strikes he makes not by the books he reads.

Having assured them all, do not forget to check his financial licenses. As an **investment** [**consultant**](https://www.sulekha.com/investment-consultants/mumbai) **in Mumbai**, he should mandatorily possess either of the core security license 6 or 7. Besides, the individual might also be found possessing the security license 63, 65 or 66.

* **Check His Background**

Before choosing a **certified financial planner Mumbai**, who is yet to take over the financial stakes of your company, make sure you double check his history. [Cross check](https://www.datacheckinc.com/blog/2016/06/check-financial-advisors-background/) whether he has had any legal pursuit before giving him the clean chit. If yes, then pushing his chances to the least seems to be a better option.

* **Detailed Report**

Never hesitate to ask for a sample of the past working experience before hiring an **investment consultant in Mumbai** for any purpose. Relying completely on degrees and resume might not always be 100% effective. However, quarterly or yearly report of how his performance in the previous company was, might give you a clearer picture of his efficacy.

* **Read And Re-Read The Clause**

Your investment planner might anytime come up with an arbitrary [clause](https://www.sec.gov/divisions/investment/advoverview.htm) before signing the agreement. If so, then always verify in between the lines before agreeing to any of them. If unsure, appoint someone responsible for the job.

It is always better to plan and strategize in the first place than sitting helplessly at the second. Besides keeping the preliminary tips in mind, also question his knowledge on industrial terminologies. Even though he is furnished with exceptional industrial vocabulary skills, do not hesitate to cross check his disciplined knowledge about the same.