

# fiduciary financial advisor reviews

**fiduciary financial advisor reviews** have become an essential resource for individuals seeking trustworthy and transparent financial guidance. As the demand for ethical financial planning grows, understanding what sets fiduciary advisors apart from other financial professionals is crucial. This article explores the importance of fiduciary financial advisors, the advantages they offer, and how to effectively interpret fiduciary financial advisor reviews when choosing the right expert for your financial needs. Additionally, the article covers key factors to consider, common review themes, and tips for maximizing the value of these reviews in your decision-making process. Whether you are planning for retirement, managing investments, or seeking comprehensive financial advice, fiduciary financial advisor reviews provide valuable insights to ensure informed choices.

- Understanding Fiduciary Financial Advisors
- Benefits of Working with a Fiduciary Financial Advisor
- How to Evaluate Fiduciary Financial Advisor Reviews
- Common Themes in Fiduciary Financial Advisor Reviews
- Tips for Choosing the Right Fiduciary Financial Advisor

## Understanding Fiduciary Financial Advisors

Fiduciary financial advisors are professionals who are legally and ethically obligated to act in the best interests of their clients. Unlike non-fiduciary advisors, who may recommend products that generate commissions or benefits for themselves, fiduciaries must prioritize the client's financial well-being above all else. This fiduciary duty is a key differentiator and is often highlighted in fiduciary financial advisor reviews as a marker of trust and reliability.

## Definition and Legal Obligations

The fiduciary standard requires advisors to provide advice that is free from conflicts of interest and to disclose any potential conflicts transparently. This standard is often codified in laws and regulations, including the Investment Advisers Act of 1940 in the United States. Fiduciary financial advisors must act with loyalty and care, making decisions that align with the client's goals, risk tolerance, and financial situation.

## **Types of Fiduciary Financial Advisors**

There are various types of fiduciary advisors, including Registered Investment Advisors (RIAs), Certified Financial Planners (CFPs), and certain fee-only financial planners. These professionals typically charge fees based on assets under management, hourly rates, or flat fees, rather than commissions, which helps reduce potential conflicts of interest.

## **Benefits of Working with a Fiduciary Financial Advisor**

Choosing a fiduciary financial advisor offers multiple benefits that contribute to better financial outcomes and peace of mind. Fiduciary financial advisor reviews often highlight these advantages, making them an essential factor to consider during the advisor selection process.

### **Trust and Transparency**

One of the primary benefits is the heightened level of trust due to the fiduciary's obligation to act in the client's best interest. Fiduciary advisors provide full transparency about fees, investment strategies, and potential conflicts, which is frequently praised in fiduciary financial advisor reviews.

### **Personalized Financial Planning**

Fiduciary financial advisors tailor their recommendations based on comprehensive assessments of a client's financial status, goals, and risk tolerance. This individualized approach ensures that advice aligns with long-term objectives rather than short-term gains or external incentives.

### **Cost Efficiency and Fee Structures**

Because fiduciary advisors often operate on a fee-only basis, clients avoid hidden commissions and sales incentives. This fee structure is commonly noted in fiduciary financial advisor reviews as a positive attribute that fosters unbiased advice and cost efficiency over time.

## **How to Evaluate Fiduciary Financial Advisor Reviews**

Fiduciary financial advisor reviews can vary in quality and detail, making it important to approach them with a critical eye. Proper evaluation helps identify advisors who consistently deliver value and uphold fiduciary responsibilities.

## **Assessing Review Credibility**

Review credibility depends on factors such as the source of the review, the specificity of feedback, and the presence of both positive and negative comments. Verified reviews from reputable platforms tend to provide more reliable insights. Look for reviews that mention concrete experiences, such as communication style, responsiveness, and financial outcomes.

## **Identifying Red Flags and Positive Indicators**

Common red flags in fiduciary financial advisor reviews include complaints about hidden fees, lack of transparency, or advice that seemed misaligned with client goals. Positive indicators often include praise for clear communication, thorough financial analysis, and adherence to fiduciary duties.

## **Comparing Multiple Reviews and Advisors**

Comparing reviews across several fiduciary financial advisors helps create a balanced perspective. Consider the consistency of feedback and the advisor's experience with clients who have similar financial situations. This comparative approach ensures a well-rounded evaluation.

## **Common Themes in Fiduciary Financial Advisor Reviews**

Analyzing fiduciary financial advisor reviews reveals recurring themes that can guide prospective clients in their selection process. Understanding these themes provides clarity on what to expect and prioritize.

### **Communication and Accessibility**

Many reviews emphasize the importance of clear, timely communication. Clients appreciate advisors who explain complex financial concepts in an understandable manner and remain accessible for questions or updates. This theme consistently emerges as a critical factor in client satisfaction.

### **Expertise and Professionalism**

Fiduciary financial advisor reviews often highlight the advisor's qualifications, certifications, and industry knowledge. Professionalism in handling sensitive financial matters and offering strategic advice is a common point of praise.

## **Customized Solutions and Goal Achievement**

Clients frequently comment on the advisor's ability to develop tailored financial plans that address their unique goals, such as retirement planning, investment management, or tax optimization. Success stories and progress toward financial milestones are typical positive remarks.

## **Tips for Choosing the Right Fiduciary Financial Advisor**

Leveraging fiduciary financial advisor reviews effectively involves a strategic approach to ensure the selection of a qualified and trustworthy advisor.

### **Verify Credentials and Fiduciary Status**

Confirm that the advisor holds recognized certifications such as CFP, CPA, or CFA, and verify their fiduciary status through regulatory bodies or professional organizations. This verification is a fundamental step before considering reviews.

### **Conduct Interviews and Ask Key Questions**

Use reviews as a starting point to shortlist advisors, then conduct interviews to ask about fee structures, investment philosophy, conflict of interest policies, and client experiences. Direct interaction often clarifies points raised in fiduciary financial advisor reviews.

### **Consider Compatibility and Communication Style**

Beyond qualifications, the advisor's communication style and personal rapport are crucial. Choose an advisor whose approach aligns with your preferences, as noted by clients in reviews, to foster a productive long-term relationship.

### **Evaluate Fee Transparency and Value**

Ensure the advisor clearly explains all fees and demonstrates how their services provide tangible value. Fiduciary financial advisor reviews frequently mention the importance of transparent fees and cost-effective advice.

## **Review Ongoing Support and Services**

Consider the advisor's commitment to ongoing portfolio management, financial education, and regular reviews. Clients often cite continuous support as a key benefit in fiduciary financial advisor reviews.

- Verify advisor credentials and fiduciary status
- Review and compare client feedback carefully
- Conduct personal interviews before making a decision
- Assess fee structures for transparency and fairness
- Prioritize communication and compatibility

## **Frequently Asked Questions**

### **What is a fiduciary financial advisor?**

A fiduciary financial advisor is a professional who is legally obligated to act in the best interests of their clients, putting the clients' needs ahead of their own.

### **Why should I look for fiduciary financial advisor reviews?**

Reviews provide insights into the advisor's trustworthiness, professionalism, and performance, helping you choose a fiduciary advisor who truly acts in your best interests.

### **Where can I find reliable fiduciary financial advisor reviews?**

Reliable reviews can be found on platforms like the National Association of Personal Financial Advisors (NAPFA), the Certified Financial Planner Board (CFP Board), and trusted third-party websites such as Yelp or Google Reviews.

### **What should I look for in fiduciary financial advisor reviews?**

Look for comments about transparency, communication, personalized advice, ethical behavior, and how well the advisor has helped clients meet their financial goals.

## **How do fiduciary financial advisor reviews impact my decision?**

They help you assess the advisor's reputation and client satisfaction, ensuring you choose someone reliable who prioritizes your financial well-being.

## **Are fiduciary financial advisor reviews always unbiased?**

Not always; some reviews may be influenced by personal experiences or marketing. It's important to read multiple reviews and cross-check information from various sources.

## **Can fiduciary financial advisor reviews help me avoid financial scams?**

Yes, reviews can highlight any past issues or unethical behavior, helping you avoid advisors who may not adhere to fiduciary standards or engage in scams.

## **How often should I check fiduciary financial advisor reviews?**

It's wise to check reviews before hiring an advisor and periodically afterward to stay informed about any changes in their service or reputation.

## **Do fiduciary financial advisors always have positive reviews?**

Not necessarily; even good advisors can receive some negative reviews. The key is to look for consistent patterns and how the advisor responds to criticism.

## **Can I trust online fiduciary financial advisor reviews completely?**

While online reviews are helpful, they should be one part of your decision-making process. Also conduct interviews, check credentials, and verify fiduciary status through official registries.

## **Additional Resources**

### *1. The Trusted Advisor: Building Lasting Client Relationships*

This book explores the essential qualities and practices that make a financial advisor truly trusted by their clients. It delves into communication techniques, ethical standards, and the fiduciary responsibilities that underpin a successful advisory relationship. Readers will learn how to foster transparency and build long-term trust, which is crucial for fiduciary advisors.

### *2. Fiduciary Duty and Financial Advice: Navigating Ethical Challenges*

Focused on the legal and ethical obligations of fiduciary financial advisors, this book provides an in-depth review of fiduciary standards and their application in real-world scenarios. It highlights case studies where advisors upheld or failed their fiduciary duties, offering lessons on maintaining integrity and client-first

approaches. Ideal for professionals seeking to sharpen their ethical decision-making skills.

### *3. Evaluating Financial Advisors: A Consumer's Guide*

This practical guide helps consumers understand what to look for when choosing a fiduciary financial advisor. It covers key criteria such as credentials, fee structures, and performance reviews, empowering readers to make informed decisions. The book also discusses common red flags and how to verify an advisor's regulatory standing and reputation.

### *4. Fiduciary Financial Planning: Principles and Best Practices*

A comprehensive resource for financial advisors, this book outlines the principles of fiduciary financial planning and best practices to implement them effectively. It emphasizes the importance of putting clients' interests first and provides strategies for transparent communication and conflict-of-interest management. The book also includes tools to conduct thorough client reviews and maintain compliance.

### *5. Client Reviews and Feedback: Enhancing Fiduciary Financial Services*

This title focuses on the role of client reviews and feedback in improving fiduciary financial advisory services. It discusses methods for collecting, interpreting, and acting on client feedback to enhance service quality and trust. Advisors will find techniques for encouraging honest reviews and turning client insights into actionable improvements.

### *6. The Fiduciary Advisor's Handbook: Managing Risk and Compliance*

Designed for financial advisors, this handbook covers risk management and compliance challenges associated with fiduciary duties. It provides practical advice on maintaining regulatory compliance while delivering client-centered advice. The book also addresses how to document advisor-client interactions and reviews to mitigate legal risks.

### *7. Transparency in Financial Advising: Building Trust through Disclosure*

This book stresses the importance of transparency and full disclosure in fiduciary financial advising. It explains how clear communication about fees, conflicts of interest, and investment strategies can strengthen client relationships. Readers will gain insights into creating transparent review processes that enhance credibility and client satisfaction.

### *8. Performance Reviews for Financial Advisors: Tools and Techniques*

A guide aimed at financial advisory firms and individual advisors, this book covers methods for conducting effective performance reviews. It highlights key metrics and qualitative factors to assess advisor effectiveness and client outcomes. The book also explores how regular reviews can help maintain fiduciary standards and improve advisory services.

### *9. Ethics and Accountability in Fiduciary Financial Services*

This book examines the ethical foundations and accountability mechanisms in fiduciary financial advisory roles. It discusses challenges advisors face in balancing profit motives with client interests and offers frameworks to uphold ethical behavior. The text is useful for both new and experienced advisors seeking to reinforce their commitment to fiduciary responsibility.

## **Fiduciary Financial Advisor Reviews**

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**fiduciary financial advisor reviews: The Essential Advisor** Bill Crager, Jay Hummel, 2016-05-02 Leverage the financial services evolution to maximize your firm's value The Essential Advisor presents an insightful handbook for advisors looking to navigate the changing face of financial services. The industry is evolving, consumers are evolving, and many advisors are being left behind as old methods become less and less relevant. This book shows you how to turn this shift into a positive, by positioning your firm to maximize these new opportunities, and deliver the results and experience increasingly expected of financial advisors. You'll learn how to provide the transparency, hands-on interaction, and around-the-clock access today's clients demand, and how to consistently deliver service that robo-advisors cannot duplicate. Emerging technologies do not have to be a threat to your practice—they are tools that represent opportunities to provide greater service to your clients, and smart technology integration will be a hallmark of firms that survive the shift. This guide provides a clear vision of the future of financial services, and an indispensable management framework for maximizing your firm's future value. Advisors are increasingly confused about what clients are seeking, and clients are equally confused about what advisory firms offer that alternatives cannot. This book helps clear the air on both sides by examining the client's perspective of financial services, and helping advisors better communicate their strengths. Articulate the value of your services Leverage new technology to complement your practice Capitalize on opportunities and maximize your firm's value Position your firm to benefit from the changing consumer population Financial advisors can only grow their businesses if clients know what they do, know how to hire them, and can access them affordably. The Essential Advisor shows you to bring your firm into the future successfully.

**fiduciary financial advisor reviews: Success as a Financial Advisor For Dummies** Ivan M. Illan, 2018-11-09 A must-have reference for financial advisors In step-by-step detail, Success as a Financial Advisor For Dummies covers how a current or would-be financial advisor can maximize their professional success through a series of behaviors, activities, and specific client-centric value propositions. In a time when federal regulators are changing the landscape on the standard of care that financial services clients should expect from their advisors, this book affords professionals insight on how they can be evolving their practices to align with the regulatory and technological trends currently underway. Inside, you'll find out how a financial advisor can be a true fiduciary, how to compete against the growing field of robo-advisors, and how the passive investing trend is actually all about being an active investor. Additionally, you'll discover time-tested advice on building and focusing on client relationships, having a top advisor mindset, and much more. Master



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**fiduciary financial advisor reviews: What Your Financial Advisor Isn't Telling You** Liz Davidson, 2016-01-05 Protect your money with this “accessible and practical” guide to hiring and working with financial advisors (Publishers Weekly, starred review). Hiring a trained expert to safeguard and grow your wealth seems like a foolproof decision, but it can go awry for many people. You should never blindly trust that your advisor has your best interests at heart—and while there are many benefits to working with a financial pro, there are some things you should know first. Drawing on her insider’s knowledge of how the financial advice profession really works, Liz Davidson shows how to judge whether an advisor is going to help or harm your savings. This no-nonsense guide covers questions such as: How should you decide if you really need an advisor? What financial moves can you make without their help? What important questions should you ask before trusting them with your money? What are the red flags you should run from? What does all their jargon really mean? Learn how to take control of your financial well-being—either with a financial advisor or without one. “This book is mandatory reading for anyone who wants a better understanding of how to manage their money.” —Mary Beth Franklin, InvestmentNews “Valuable tools for managing one’s personal finances for maximum results.” —Publishers Weekly, starred review

**fiduciary financial advisor reviews: The Wisdom of Financial Journey: A Guide to Navigating the Financial Milestones of Life** Pasquale De Marco, 2025-08-11 Embark on a journey of financial wisdom with The Wisdom of Financial Journey: A Guide to Navigating the Financial Milestones of Life. This comprehensive guide provides invaluable insights and practical strategies to help you make informed financial decisions and achieve financial well-being. Within these pages, you'll discover a wealth of knowledge and guidance to navigate the complexities of financial planning, from establishing a solid foundation to maximizing retirement income and protecting your legacy. Learn how to create a comprehensive budget, manage debt effectively, and build an emergency fund. Explore the world of investments, understanding various vehicles, allocating assets wisely, and prioritizing retirement savings. Address the challenges of healthcare costs, gaining clarity on Medicare and Medicare supplements, long-term care insurance options, and prescription drug coverage. Discover strategies for managing out-of-pocket medical expenses and making the most of health savings accounts. Cultivate financial well-being by embracing financial literacy, seeking professional advice, developing a positive money mindset, and avoiding common pitfalls. Navigate financial transitions smoothly, whether it's divorce, retirement, or career changes, with expert guidance. Ultimately, this book empowers you to achieve financial peace of mind. Learn to cultivate financial confidence, overcome anxiety, and find joy and fulfillment beyond wealth. Make informed decisions and embrace a proactive approach to your finances to live a financially secure and rewarding life. With The Wisdom of Financial Journey, you have a trusted companion on your financial journey, helping you make informed decisions, navigate challenges, and achieve your financial goals. If you like this book, write a review!

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fill that knowledge gap. Marshall Weintraub, Michael Merrill, and Cole Kimball are financial advisors with Finity Group, LLC, a financial planning firm specializing in working with doctors.

**fiduciary financial advisor reviews: Financial Services Anti-Fraud Risk and Control Workbook** Peter Goldmann, 2010-01-07 Myth-busting guidance for fraud prevention in a practical workbook format An excellent primer for developing and implementing an anti-fraud program that works, Financial Services Anti-Fraud Risk and Control Workbook engages readers in an absorbing self-paced learning experience to develop familiarity with the practical aspects of fraud detection and prevention at banks, investment firms, credit unions, insurance companies, and other financial services providers. Whether you are a bank executive, auditor, accountant, senior financial executive, financial services operations manager, loan officer, regulator, or examiner, this invaluable resource provides you with essential coverage of: How fraudsters exploit weaknesses in financial services organizations How fraudsters think and operate The tell-tale signs of different types of internal and external fraud against financial services companies Detecting corruption schemes such as bribery, kickbacks, and conflicts of interest, and the many innovative forms of financial records manipulation Conducting a successful fraud risk assessment Basic fraud detection tools and techniques for financial services companies, auditors, and investigators Fraud prevention lessons from the financial meltdown of 2007-2008 Written by a recognized expert in the field of fraud detection and prevention, this effective workbook is filled with interactive exercises, case studies, and chapter quizzes, and shares industry-tested methods for detecting, preventing, and reporting fraud. Discover how to mitigate fraud risks in your organization with the myth-busting techniques and tools in Financial Services Anti-Fraud Risk and Control Workbook.

**fiduciary financial advisor reviews: Fear, Greed, and Other Financial Advisors** Harry South, Why do smart people make dumb money decisions? And why do your financial advisors often sound like they're selling more emotion than strategy? In Fear, Greed, and Other Financial Advisors, you'll discover how the twin forces of emotion and incentives shape the advice we receive—and the decisions we make. With sharp insight and dark wit, this book pulls back the curtain on the wealth management industry, exposing the biases, conflicts of interest, and behavioral traps that lurk behind the spreadsheets. Whether you're a seasoned investor or just starting to build your financial future, this book offers a clear-eyed roadmap to navigating a world where trust is currency and emotions run the market. Learn how to think independently, ask the right questions, and protect yourself from the most dangerous force of all: your own instincts. If you've ever wondered whether your money is working for you—or for someone else—this is the book you need.

**fiduciary financial advisor reviews: Certified trust financial advisor (ctfa) exam success 2025/2026** Alica Struth, 2025-09-16 Certified Trust Financial Advisor (CTFA) Exam Success 2025/2026 is the ultimate preparation guide for professionals seeking to achieve CTFA certification and advance their career in trust and wealth management. This resource provides a complete review of the exam domains along with 500 practice questions to strengthen comprehension, improve accuracy, and build confidence. Inside you'll find: Comprehensive coverage of fiduciary and trust activities, financial planning, tax law, investment management, and ethics. 500 practice questions with detailed explanations to reinforce learning and highlight key exam areas. Concise, organized study sections to simplify complex financial and regulatory concepts. Proven test-taking strategies to improve performance and reduce exam anxiety. Practical insights tailored for financial professionals pursuing career growth in wealth management and advisory services. Whether you are preparing for the CTFA exam for the first time or refreshing your knowledge for recertification, this guide equips you with the tools needed for exam success. Translator: Brittany Deaton PUBLISHER: TEKTIME

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Laura Meier's *The Family Nest Egg* gives parents the tools they need to find confidence, stop worrying, and secure the financial future for their loved ones. . . . A trustworthy resource. —Barbara Corcoran, founder of the Corcoran Group and Shark on ABC's *Shark Tank*

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such proceedings of the sessions, as, during the time they were depending, were ordered to be kept secret, and respecting which the injunction of secrecy was afterwards taken off by the order of the House.

**fiduciary financial advisor reviews: Positive Habits Get Results** Donna Portland, 2020-10-28 While in her fifties, Donna Portland finally summoned the courage to walk away from her unfulfilling existence and begin a fabulous journey toward finding meaning in her life. Today, she has achieved a sense of her true self and purpose, and lives authentically as a beacon of inspiration to others. In short, Portland is living proof that positive habits get results. Portland, a Master NLP coach and hypnotherapist, interweaves her personal story with research and discovery to share a practical roadmap that guides others on a journey inward—to take back their energy and change their daily habits, one by one, to start living with excellence and make positive changes that last. After addressing several aspects of physicality that include the importance of a regular sleep routine, incorporating consistent meditation and relaxation techniques, and eliminating other daily habits that steal energy, Portland leads others through headspace that encourages an attitude of gratitude, a mastering of the mind, and better time management. *Positive Habits Get Results* is a simple guide that will help anyone transform their daily habits through consistent actions to achieve wellness, success, and contentment.

**fiduciary financial advisor reviews: Mastering Your Household Finances** Barrett Williams, ChatGPT, 2025-01-16 Discover the path to financial peace and prosperity with *Mastering Your Household Finances*, an in-depth guide designed to transform your financial future. If you feel overwhelmed by balancing expenses, saving for emergencies, or simply managing day-to-day costs, this book provides the answers you need to regain control and thrive. Dive into a comprehensive exploration of household financial management with practical strategies and insights that empower you to set and achieve meaningful financial goals. From clarifying your priorities to crafting a budget that harmonizes your needs and desires, each chapter offers actionable advice that makes money management accessible and effective. Begin with a thorough assessment of your current financial situation, learning how to track income and expenses, analyze spending patterns, and evaluate debt. With this solid understanding, move forward to create a realistic budget that distinguishes between needs and wants, allowing flexibility to adapt to changing circumstances. Learn to manage essential household expenses, discover techniques for reducing utility bills, and master savvy shopping to ensure your needs are met without breaking the bank. Uncover innovative money-saving tactics, from smart grocery shopping tips to energy efficiency at home, that contribute significantly to your bottom line. Secure your financial future by building an emergency fund, effectively managing and paying off debt, and planning for major life events. Explore investment options for retirement and the importance of savings accounts—all tailored to ensure long-term stability. Involve your entire family in financial planning, fostering an environment of shared goals and mutual support. With chapters dedicated to teaching kids about money, holding family financial meetings, and setting collective goals, this book ensures everyone is on the path to financial literacy. *Mastering Your Household Finances* is a blueprint for achieving financial peace, where every family member contributes to a brighter, more prosperous future. Start your journey today and invite financial success into your home.

**fiduciary financial advisor reviews: *Attacking the Standardized Exam*** Ronald S. Thompson, 2011-09 I have spent the better part of the last 53 years taking well over a thousand multiple choice tests. As a teenager, I struggled through high school. Armed with an average IQ and some fairly significant learning disabilities, I barely graduating with a 1.4 grade point average. However, I was smart enough to figure out early on that much of academics, and that achieving success in academics, had far more to do with the ability to master multiple choice tests than raw intellect. From there I began a 35 year study on the art and science of passing, mastering and scoring high on multiple choice tests. Despite a very substandard high school GPA, I scored high enough on the SAT and the ACT to be accepted to the University of Michigan, one of the top academic institutions in the Country. Upon graduation from college, I accepted a commission as an officer in the United States

Marine Corps. As a Marine Officer, I completed dozens of military and civilian schools, including a Masters Degree from Boston University, and a Juris Doctor Degree from the University of Detroit School of Law. In fact, I earned a full ride military scholarship to law school based primarily on the fact I scored so highly on the Law School Aptitude Test (98th percentile). Upon completion of law school, I passed the Michigan Bar exam on the first attempt, scoring 149 points on the multistate (the multiple choice portion of the exam), which was one question away from automatic passage (at 150 they examiners do not need to grade the essay portion). I have also taken and applied many of the Marine Corps concepts of discipline and mental toughness to the art of preparing for, taking, and passing multiple choice tests. Resigning my commission and leaving the Marine Corps in 1990, I continued both my education as well as honing my test taking skills. I currently hold 12 professional licenses and 5 professional designations, which required me to pass several comprehensive and difficult multiple choice examinations. I have also attended dozens of professional test preparation courses. From those courses I have cherry picked all of the valuable lessons and test taking tips and have included those in this book. One of the professional licenses I hold is a paramedic license. As a paramedic I have gained a much greater understanding of the anatomy and physiology of test taking. Test taking is all about the central nervous system, which of course includes the brain. However, as I explain in this book, it is clear that the sympathetic and parasympathetic nervous systems have as much to do with passing and failing multiple choice tests as does the brain. Accordingly, I have also applied many of those principals in this book.

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