

Phoenix Financial Group

Investor Education Series: Due Diligence Questions to Ask



The following are very simple, straight-forward questions designed to help assess an individual's knowledge of the Financial Markets.

- Can you tell me about your industry Designations?
- How does your typical day begin & end?
- What happens in-between?
- How often should I expect to hear from you?
- What Sort of Economic reports do you follow? And why?
- What are the three most important economic reports you would recommend & Why? When are they published?
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About the Author:

The author, Joseph E. Camargo, is the founder & Portfolio Manager with Phoenix Investments. Mr. Camargo has over 24 years experience in the Financial Services industry and is a graduate of the **College for Financial Planning**, holding the **AAMS® & *AWMA®** designations (***one of only 1,250 professionals across the country to do so**). He also holds **FINRA Series 7, Series 66** licenses. Mr. Camargo is also a **Certified Financial Planner** candidate at **Boston University**. Joe presently lives in the South Shore area with his wife and two youngest children.



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