

We carried out a client survey in 2024 to find out what our clients thought of us and the service we provide. Here's what they had to say:

Would you recommend us to other people?

Yes: 100%

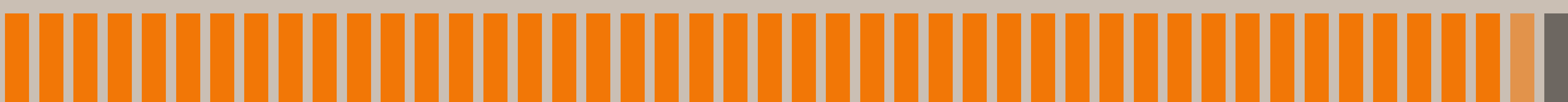
Do you believe working with us has helped / will help you to achieve your financial goals?

Yes: 100%

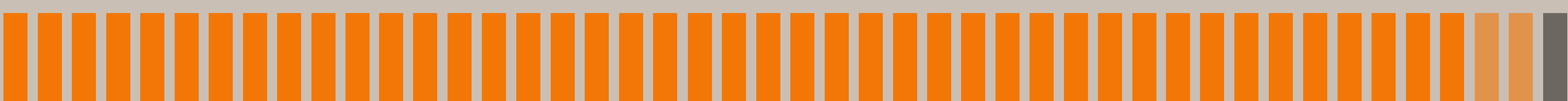
How satisfied are you with our performance in the following areas?

Very satisfied Mostly satisfied Somewhat dissatisfied Mostly dissatisfied

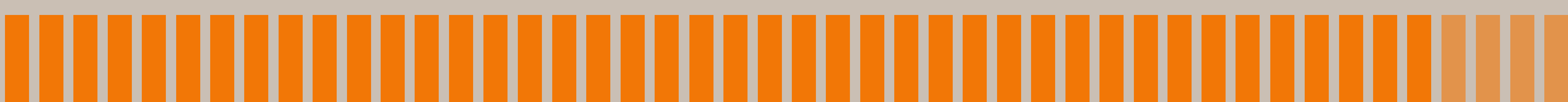
Speed of response from your planner:



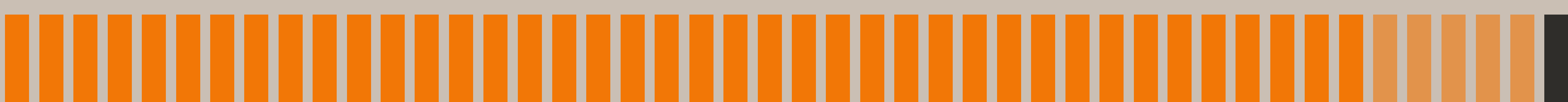
Speed of response from the support team:



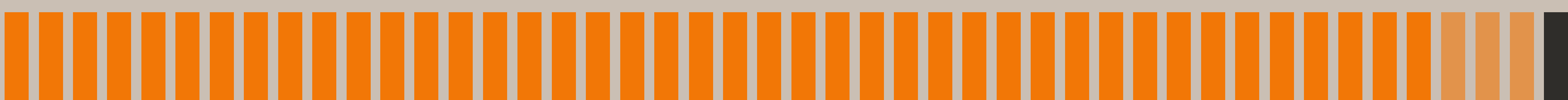
Understanding your needs and objectives:



Communication between our meetings:



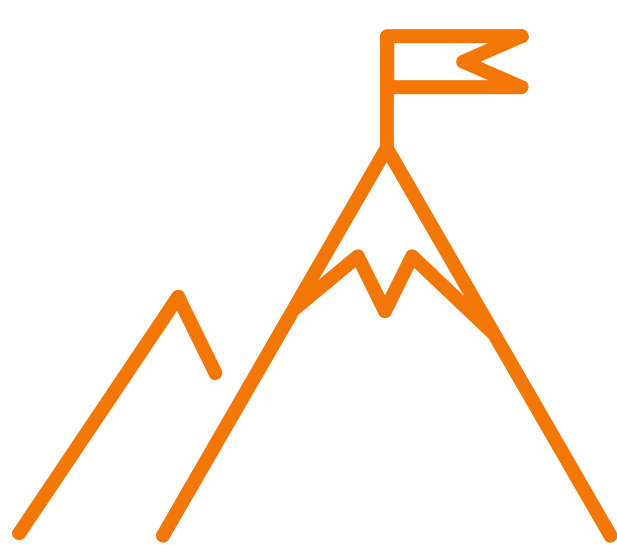
Annual reviews:



Top three areas our clients value in their relationships with us:



Providing a "safe pair of hands"



Support and assistance in meeting financial/life goals



Our knowledge and experience

What are the three biggest financial concerns we help our clients with?

Those who have not yet retired:



Not having enough money to live my preferred lifestyle in retirement



Not having enough money to retire at my preferred retirement age



The level of investment returns or potential investment losses

Those who have already retired:



Not having enough money to continue living my preferred lifestyle in retirement



The cost of care in old age

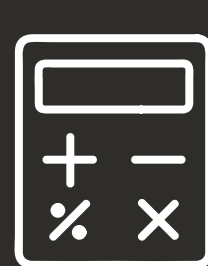


The level of investment returns or potential investment losses

Business owners:



Maintaining profitability



Taking money from my business tax-efficiently



Selling my business for enough to facilitate my ideal retirement

What is the biggest single benefit you get from working with us?



Peace of mind with someone I trust



Knowing my finances are in safe hands



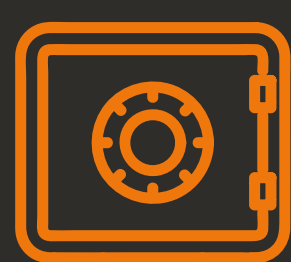
Confidence in your ability to look after my finances



Bring our finances together for a more cohesive approach



Easy to contact and very responsive to any request/situation



Feeling reassured that all my financial affairs are in order and being looked after



The knowledge that my investments are being looked after well gives me peace of mind and frees up more time to enjoy today



Security of knowing that I have a trusted advisor that has set me on the right path with a financial plan

Get in touch

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