

We carried out a client survey in 2025 to find out what our clients thought of us and the service we provide. Here's what they had to say:

87.50%

would recommend us to their friends, family or colleagues

100%

believe working with us has helped or will help achieve their financial and personal goals

WHAT TOP THREE THINGS DO YOU VALUE FROM YOUR PLANNER?



Our knowledge and experience



Support and assistance in meeting financial/life goals.



Investment management

HOW SATISFIED ARE YOU WITH OUR PERFORMANCE IN THE FOLLOWING AREAS?



very satisfied



mostly satisfied

Speed of response from your adviser:

93.75%

6.25%

Speed of response from the support team:

93.75%

6.25%

Understanding your needs and goals:

93.75%

6.25%

Communication between meetings:

87.50%

12.50%

Annual refine meetings:

87.50%

12.50%

WHAT ARE YOUR THREE BIGGEST FINANCIAL CONCERNS?

Those who have not yet retired:



Not having enough money to live my preferred lifestyle in retirement



My family's financial security should anything happen to me



Giving my wealth to younger generations



Not having enough money to retire at my preferred retirement age

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 amount of Inheritance Tax which will be payable on my death.

WHAT IS THE SINGLE BIGGEST BENEFIT YOU GET FROM WORKING WITH US?



"Peace of mind."



"Your financial knowledge."



"Discussing our finances in a way we can easily understand."



"Good ongoing investment advice."



"We have always experienced exceptional and beneficial help in managing our finances, exceeding expectations in terms of advice, support, and results."

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