

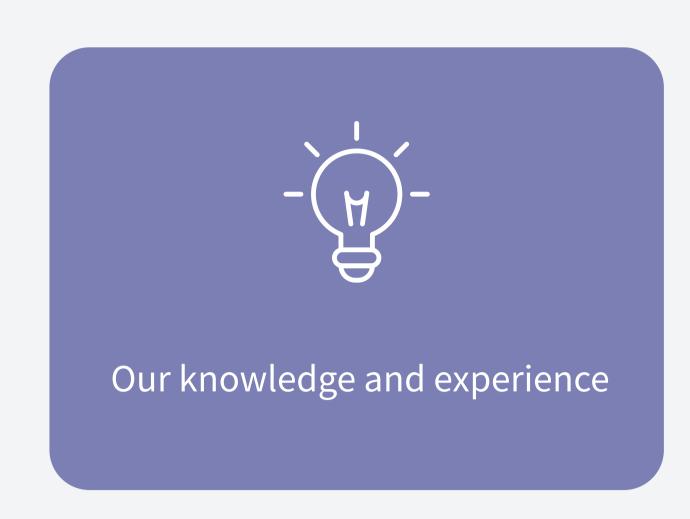
We carried out a client survey in 2025 to find out what our clients thought of us and the service we provide. Here's what they had to say:

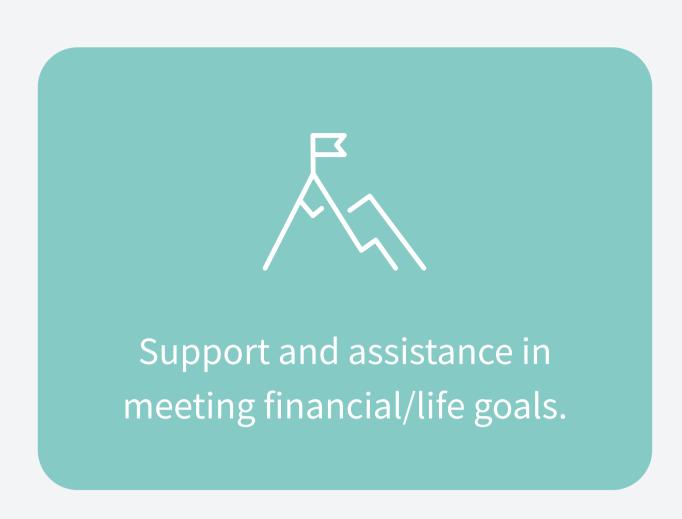
87.50% would recommend us to their friends, family or colleagues

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?







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

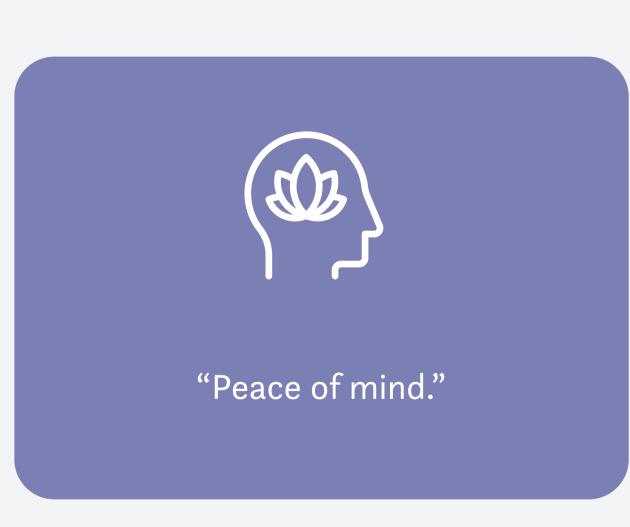


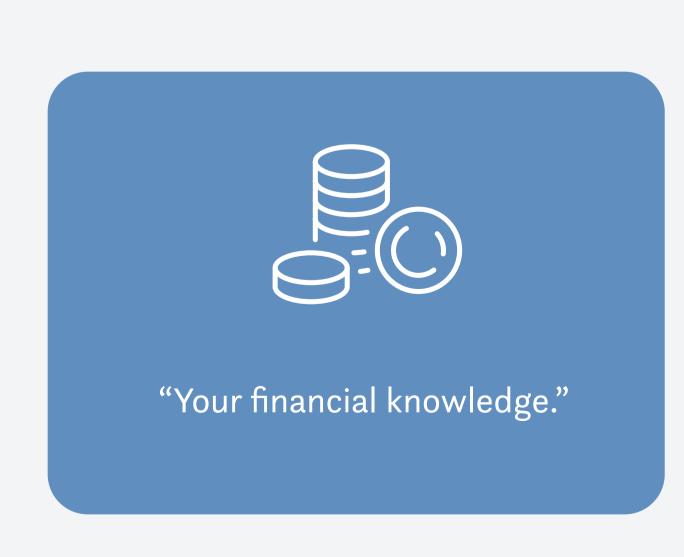
WHAT ARE YOUR THREE BIGGEST FINANCIAL CONCERNS?

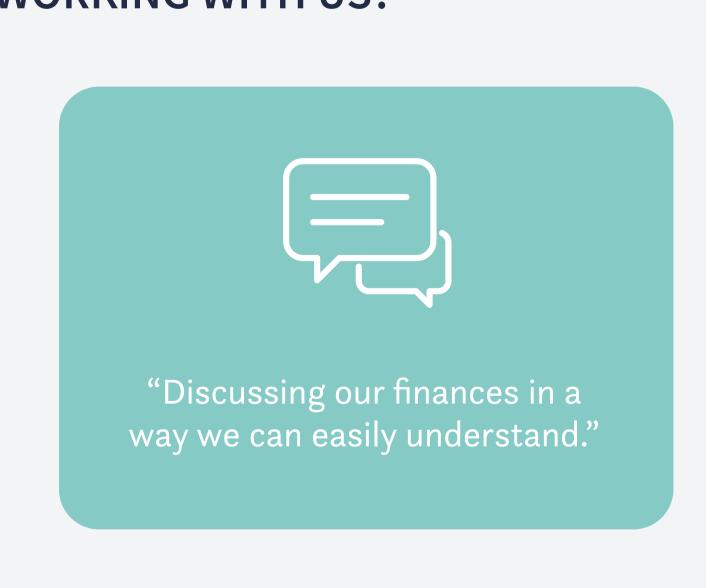


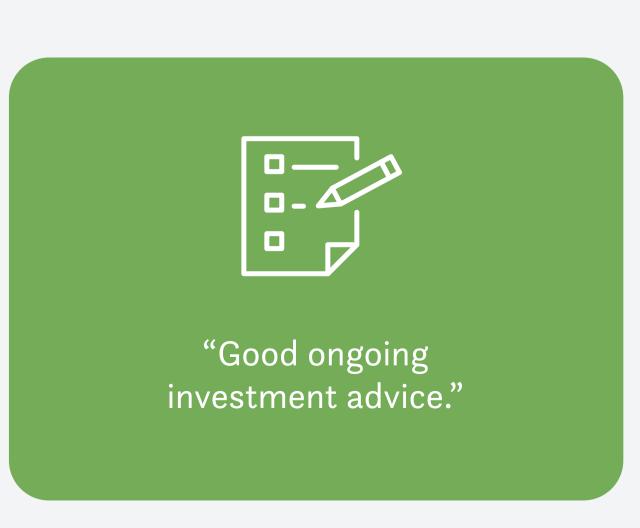


WHAT IS THE SINGLE BIGGEST BENEFIT YOU GET FROM WORKING WITH US?











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

GET IN TOUCH



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