

LISA VARLEY

Background report to support
inclusion in the **2020 Guide To The
UK's Top Rated Financial Advisers**



Lisa Varley

Mercia Financial Planning Ltd



Top Rated 2020

5.0 / 5 ★★★★★ 77 reviews

VouchedFor checks:

- ✓ FCA Authorised
- ✓ Recent Client Reviews
- ✓ Independent Financial Adviser
- ✓ Qualifications Uploaded
- ✓ Positive First Impressions

Services offered

- ✓ Investments and Savings
- ✓ Pensions
- ✓ Retirement income (annuities, drawdown)
- ✓ Pension Transfers - Non Specialist
- ✓ Inheritance Planning

Qualifications listed

Standard Qualifications: 2 Qualifications

IFS - Award in Pension Transfers (AwPETR)

CII - Equity release

[view more at the profile link below](#)

Client Reviews

Lisa Varley

Mercia Financial Planning Ltd



5.0 out of 5

Review from Verified Client

Oxfordshire | November 2019

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★☆☆

What were the circumstances that caused you to look for a financial adviser?

I needed professional advice on how to make the best of my pension pot.

How did Lisa help you?

She advised on the options available.

Have you seen the outcome you were hoping for?

I believe the fund is doing as well as can be expected in the circumstances.

What could they have done better?

Not sure

Review from Verified Client

Warwickshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Planning for retirement, wanting to check that savings were sensible, wanting to make provision for children

How did Lisa help you?

Helped us get the whole picture across all our income and outgoings, and made valuable recommendations for things that we could do differently / better

Have you seen the outcome you were hoping for?

Definitely

What could they have done better?

Can't think of anything

Review from Verified Client

Warwickshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

The fund from my previous pension provider was not performing well and was expensive (fees)

How did Lisa help you?

Showed facts on performance from other funds, advised on best option and got the fund transferred.

Have you seen the outcome you were hoping for?

It is too early to say medium-long term performance, but the transfer and the initial impressions from the new fund have been very well managed

What could they have done better?

Nothing can think of

Review from Verified Client

Oxfordshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I wanted to consolidate my pensions into a new pension that had a better return than I was seeing currently.

How did Lisa help you?

By working with me to find out my risk profile, she then went to market to find me a top-performing pension. She then did all of the paperwork to move my 3 other pension pots into the new one.

Have you seen the outcome you were hoping for?

Absolutely. Could not be happier with the new pension and look forward to Lisa's review to make sure I am on track for my target.

What could they have done better?

No issues. Lisa is genuinely helpful, invested in seeing me reach my pension goal and has given me solid and pertinent advice.

Review from Verified Client

Warwickshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Having taken redundancy and deciding to retire early I needed to look at consolidating my pensions along with a review of my savings.

How did Lisa help you?

Lisa carried out a full assessment of our current finances and pensions and made suggestions to how we could consolidate our investments. This was done following a assessment to judge our level of risk and provided solutions we were happy with.

Have you seen the outcome you were hoping for?

Yes. My pensions are now consolidated into a single pot with the chance to grow at a lower risk level that will provide a steady income for the future.

What could they have done better?

In my case none. Lisa both met and exceeded my expectations.

Review from Verified Client

Cheshire | November 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

What were the circumstances that caused you to look for a financial adviser?

I was in a position to want to transfer my final salary pension pot and Lisa has the training to be able to do this.

How did Lisa help you?

She carried out a full review of my circumstances, dealt with my pension provider and recommended a good home for my new pension. She also organised transferring a further pension pot so that all my pension assets are in one place. Lisa provides an annual review service that makes sure my pension pot is working for me.

Have you seen the outcome you were hoping for?

The markets have been volatile since I moved my pension, therefore it has not grown as well as it might, but that applies to pensions as a whole. I expect the long term gains to be much better than the short term position with a good pension provider.

What could they have done better?

I was happy with the service Lisa provided, including making the journey to visit me at home to carry out a full review of my personal circumstances. She listened to what I wanted and did not try to sell me services I was not interested in. All in all a pleasant experience.

Review from Verified Client

Warwickshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

We were looking for advice on what to do with our 9 pensions.

How did Lisa help you?

Lisa listened to what we wanted, then asked questions to establish a complete picture of our finances and our aspirations. She was then able to advise us on sorting out our pensions and other savings.

Have you seen the outcome you were hoping for?

Yes, our pension arrangements are much simpler now, are invested in better products and the arrangements we have are better understood (by us).

What could they have done better?

Difficult to say. Lisa has always met us in our own home and has always managed to respond quickly to any requests that we have had.

Review from Verified Client

Warwickshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I reached a stage in employment where the option of early retirement presented itself and this included some significant pension decisions.

How did Lisa help you?

Lisa navigated me through the options available and helped me reach a brilliant solution.

Have you seen the outcome you were hoping for?

Absolutely yes!

What could they have done better?

Nothing really - I was delighted with her work for me.

Review from Verified Client

West Midlands | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

We received money from retirements and family deaths, which we wanted to invest rather than leave in a bank.

How did Lisa help you?

Lisa went through all of our finances and built up a risk profile that we agreed with. Following that, Lisa identified ways to invest our money that made us feel comfortable.

Have you seen the outcome you were hoping for?

So far yes, our investments are growing.

What could they have done better?

Lisa gave us options based on our risk profile and recommended her preferred approach, which was the number one choice. The only other thing that Lisa could have done is provide us with two or three other investments and the reasons why they were discounted. This could have given us more choice to consider for the future. If we invest further next year, we may want to put our investments into other companies but know that they are not necessarily second best to our original investments.

Review from Verified Client

West Midlands | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Inheritance

How did Lisa help you?

Chose a best solution that matched our risk appetite

Have you seen the outcome you were hoping for?

Yes, steady growth

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I was thinking about retirement and wanted to know if I could afford it.

How did Lisa help you?

She reviewed my finances and set out her findings very clearly so that I could make my decision.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing. I found her advice to be thorough and clear.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

sorting out my pension

How did Lisa help you?

she quickly understood i was looking for a steady reliable investment that was unlikely to loose money rather than something that was potentially be higher gains and higher risk.Something that 3 other advisors i spoke when choosing my advisor seemed unable to understand.She explained things clearly and patiently.

Have you seen the outcome you were hoping for?

Yes Pensions smoothly and quickly transferred and consolidated. My attempts to get answers even to basic questions from my pensions companies direct had proved frustrating and very time consuming Lisa seemed to sort this out very quickly.The pensions are performing as expected and slightly better than similar products when i last looked.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

My wife was approaching retirement, had numerous bits of pension and savings, and needed advice upon best way forward. When Lisa came to advise my wife, I took the opportunity of having her advise me also. A good decision.

How did Lisa help you?

Clear understanding of our circumstances and needs, and advice that was appropriate , concise and sensible.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

I am fully satisfied. Lisa approached my requirements my understanding what I need (I am financially cautious) and giving advice that was highly suitable.

Review from Verified Client

Staffordshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I wanted to move my pension

How did Lisa help you?

She managed to move my pension and get me the 25% I required from it

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing Lisa was quick on the ball and advised me every step of the way

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

We were looking at retirement options

How did Lisa help you?

Lisa helped us to consolidate our pensions and investments.

Have you seen the outcome you were hoping for?

Due to Lisas advice on our pensions and investments we were able to make an informed decision about retirement.

What could they have done better?

We are very happy with all the help and advice Lisa has given us. She is always quick to respond to any financial concerns or advice we require.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I was approaching retirement and needed to consolidate my pension plans.

How did Lisa help you?

Lisa helped me to consolidate my pension plans and her review of my finances helped to reassure me that I could afford to retire.

Have you seen the outcome you were hoping for?

Yes, I'm enjoying my retirement and I'm confident that my finances are being well looked after.

What could they have done better?

Really nothing! I am completely satisfied with the service that I've received from Lisa. She goes out of her way to help whenever I have any questions.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Pre-retirement planning

How did Lisa help you?

Lisa structured my decision-making with her pragmatic, professional insights including supporting me transfer my company pension to a SIPP

Have you seen the outcome you were hoping for?

I am 100% confident with the course of action I have taken following Lisa's advice.

What could they have done better?

I have no issues whatsoever with my interactions with Lisa.

Review from Verified Client

Gloucestershire | October 2019

★★★★★ 5 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I have been part of a local government pension scheme for the last 35 years and I was looking at getting my money out and putting it into a fund were I could have access, as the scheme I was in meant it was locked until my retirement

How did Lisa help you?

Although a lot of the ground work was completed by another company there were not able to get it across the finishing line so they passed me onto Lisa, who took over my case and saw it through, I found Lisa to be very supportive in this and made sure I was aware of what was happening every step and kept me update to timescales

Have you seen the outcome you were hoping for?

Yes, it allowed me to take some money out now and the rest I can see growing to meet my future needs and by being provided with a cash plan it made the process make more sense and very easy to view on line and keep in touch with my policies and their growth

What could they have done better?

I've got nothing negative to say, Lisa made very welcome and made sure I was clear in my own mind that what she was doing and made sure the policies I was signing up to were in my best interests, she also made me aware that things can go wrong and not a bed of Rose's but I feel confident that if things start to change then Lisa will not wait for our regular reviews to contact me to discuss and review my position and make sure any changes have my best interests at the forefront of any decisions / amendments.

Review from Verified Client

Merseyside | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I was wanting to transfer my frozen Vauxhall motors pension into another company.

How did Lisa help you?

Lisa did all the work for me with good advice and information, keeping me fully informed at all times.

Have you seen the outcome you were hoping for?

Yes, my pension is now starting to pay dividends more so than it was whilst frozen.

What could they have done better?

I think the advice I received from Lisa was ideal and personally I can't really say what she would need to improve on as everything she has done for me has been spot on.

Review from Verified Client

Lincolnshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

My circumstances were changing and I required professional advice, especially regarding my pensions.

How did Lisa help you?

Lisa's approach was very comprehensive, down to earth and informative. She highlighted the pros and cons of different options together with their outcomes as well as raising options I had not considered. All this was done in a friendly manner yet also direct, so there were no ambiguities.

Have you seen the outcome you were hoping for?

Yes, I am very happy and have seen her again recently to seek further advise.

What could they have done better?

Nothing. Lisa combines a traditional down to earth style with modern professionalism.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I knew my pensions were in a mess and that I needed to get things in order quickly. Also, my husband needed to consider his options in terms of his pension scheme in terms of possibly coming out of his final salary pension.

How did Lisa help you?

Lisa makes the options clear, giving a great understanding of the pros and cons. She makes the risks clear as well as the rewards, and does not overstate either. She is warm and listens well, but she is also very efficient and does not waste your time. With other financial advisors I became very frustrated with being buried in endless reports and paperwork. Lisa does provide what you need but steers you through what is key and what is not. She makes it simple but is not simplistic. She is incredibly helpful, even sorting through our old piles of pension paperwork and weeding out what we needed to keep and what we could destroy. When things change in the market Lisa gets in touch proactively to suggest tweaks to the portfolio. She is incredibly approachable but also very professional. Couldn't be happier. I have walked away from 2 Financial Advisors before Lisa, but she is a keeper!

Have you seen the outcome you were hoping for?

Yes. It is all going very well and feels under control. I am confident the income will be there for us when we start to need it, which is very soon!

What could they have done better?

Honestly, nothing. She is great.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

What were the circumstances that caused you to look for a financial adviser?

Looking to improve our retirement income and savings

How did Lisa help you?

Lisa arranged a transfer of our current pension arrangement to a better managed fund and more proactive company as we weren't satisfied with the returns and management of the policies. She also arranged the transfer of company pension I had ignored for years.

Have you seen the outcome you were hoping for?

We have been pleased with the improved performance of our new pension plans.

What could they have done better?

I can't think of anything!

Review from Verified Client

Buckinghamshire | October 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

What were the circumstances that caused you to look for a financial adviser?

We sought the advice of a financial advisor to rationalise various pension funds and savings accounts several years ago.

How did Lisa help you?

Lisa spent time exploring our various options, including the transfer of a defined benefit scheme, and consolidation of savings into funds best suited to our risk appetite, our current income and future pension ambitions.

Have you seen the outcome you were hoping for?

We are yet to retire but our pension pots are performing better than previously so we are hopeful of positive outcome.

Review from Verified Client

Leicestershire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Retirement advice

How did Lisa help you?

She assessed my circumstances and provided advice regarding my pension fund

Have you seen the outcome you were hoping for?

She has provided investment advice for my pension fund which is progressing as advised.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

What were the circumstances that caused you to look for a financial adviser?

I was coming up to retirement and had investments I needed reviewing

How did Lisa help you?

Lisa asked me what I wanted from my money and advised me without being pushy. I felt she understood what I needed and I would not hesitate to recommend her to anyone needing advice.

Have you seen the outcome you were hoping for?

Yes, my investments have performed steadily which was what I was hoping for.

What could they have done better?

Nothing really, she has always been readily available when I had any questions. I feel she is always keeping an eye on things for me.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Inheritance and poor return on previous investments

How did Lisa help you?

Provided advice, guidance and a plan.

Have you seen the outcome you were hoping for?

Yes well protected in this volatile environment.

What could they have done better?

Nothing to add.

Review from Verified Client

Warwickshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Inheritance and poor previous return on investments

How did Lisa help you?

She discussed options, pros and cons and put forward a plan.

Have you seen the outcome you were hoping for?

Yes considering the volatile market her advice was very sound and protected our money.

What could they have done better?

Nothing to add here.

Review from Verified Client

Warwickshire | December 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Looking to review financial portfolio with specific need for advice on DB Pension transfer

How did Lisa help you?

She offered general advice on current investment portfolio and managed the full pension transfer process over an 11 month period

Have you seen the outcome you were hoping for?

Absolutely & will be in touch with Lisa in a regular basis going forward

What could they have done better?

Nothing - Lisa is fab and even responded to my questions only weeks after having a baby, now that is customer service!

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Moving House

How did Lisa help you?

Lisa, helped me assess whether I could afford to move house. She then helped me to select and apply for a mortgage which has allowed me to purchase the house I live in now. She also helped me to merge all my various pension pots into one pot that is much easier to manage, and has helped me to select suitable funds that are growing my retirement funds much

quicker than before.

Have you seen the outcome you were hoping for?

Yes. Lisa really helped me to understand all the products available. She helped me to find and secure a much better rate for my mortgage than I had been able to find on my own. And my pension and savings have been performing much better than they were beforehand too. Thank you.

What could they have done better?

Nothing comes to mind. Lisa is very knowledgeable and was very patient with me: she took time to explain everything to me so that I understood each aspect.

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Consideration of early retirement and whether pension and other funds would make it feasible.

How did Lisa help you?

Lisa thoroughly reviewed our portfolio. Outlining convincingly that it was feasible. Proactively came up with a comprehensive plan. She took on board our situation and considerations receptively. Very friendly and easy to get on with.

Have you seen the outcome you were hoping for?

Early days to see how plan develops. But a comprehensive diversified scheme taking into the security we required is in place. Lisa demonstrated huge energy and dedication to ensuring it's completion in a timely manner.

What could they have done better?

We can't fault Lisa. We had quotes and advice from three financial advisors. But her approach was more energetic, friendly and responsive. Plus myself and wife got along with her very easily.

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Lisa has previously help us with our mortgage and now we have set up our own company she has helped us sort out our pensions.

How did Lisa help you?

Lisa set us both up with new pensions for us to save into each month and moved our old pensions into this. She helped us understand our options.

Have you seen the outcome you were hoping for?

Yes we are really pleased with everything Lisa has done for us. She is so friendly and down to earth and explains things in a way we instantly understand. The pensions are doing great.

What could they have done better?

I really can't think of anything

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I wanted to retire early

How did Lisa help you?

Lisa did a full review. She looked at all our pensions and investments, and listened to the income we wanted in retirement. She completed a cash flow analysis which really helped us understand our position. She consolidated our Pensions and put them in a place that we can now drawdown from. She helped explain the tax rules around pensions.

Have you seen the outcome you were hoping for?

We could not be more pleased. Weve never understood pensions properly and now we feel like we really know how they work and where they are invested. We are enjoying our

retirement and Lisa is only a phone call away whenever we need her.

What could they have done better?

I don't feel she could have done anything differently

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Pensions review

How did Lisa help you?

Lisa helped us initially a few years ago to consolidate our pensions. The service she gave was second to none. She promised she would keep in contact regularly and she has not let us down. We never have to prompt her, she contacts us to let us know how our investment is going. If ever we need her she responds immediately. Nothing is too much hassle for her.

Have you seen the outcome you were hoping for?

Yes we are extremely pleased

What could they have done better?

We wouldn't change anything we're so happy she was recommended to us.

Review from Verified Client

Northamptonshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I had several old pension I wanted to review

How did Lisa help you?

This conducted a full financial review. She did an excellent job of explaining how pensions have changed and all the new rules. She wrote to my existing pension providers and did in

depth analysis and reported back to me in a way that made everything very easy to understand. She consolidated all my pensions into a plan that was not only more suited to my risk level and needs but also cheaper than what I had before.

Have you seen the outcome you were hoping for?

Yes I am extremely pleased with the job Lisa did.

What could they have done better?

I wouldn't have changed anything.

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Separated from partner and needed a full review

How did Lisa help you?

Lisa has been my Financial adviser for A number of years and what ever circumstance I present to her she is able to help me. She walked meThrough the financial implications ofMy divorce with compassion and empathy. She took everything at my pace and reviewed everything in detail so I understood everything I had. She helped me secure a mortgage for my new home, found a home forMy new pension. Nothing is ever too much trouble for her.

Have you seen the outcome you were hoping for?

Yes and more

What could they have done better?

I wouldn't change a thing

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Full review

How did Lisa help you?

Lisa has been our financial adviser for over 6 years. She has helped us with many aspects of our finances including pensions, Isas, bonds and regular savings. She stays in contact with us without us having to call her and regular comes out to visit us and go over all our plans. She is warm and friendly and keeps everything clear and simple. The performance of what she has recommended has been brilliant.

Have you seen the outcome you were hoping for?

Yes, we would never use anyone else

What could they have done better?

Nothing

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I wanted to leave my final salary pension scheme.

How did Lisa help you?

Lisa was extremely knowledgeable and professional. She explained how the process worked and the costs involved and experience extend timescales during our first conversation so I was very clear on how everything was going to work. She took the time to understand my financial and personal circumstances and my goals for retirement. she talked me through my investment options and put together a recommendation that was perfectly suited to my needs. Throughout the whole process Lisa was clear, honest about the pros and cons and friendly.

Have you seen the outcome you were hoping for?

Yes I have successfully moved my pension and so far it is performing extremely well.

What could they have done better?

I wouldn't have changed anything

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

We had recieved an inheitage and wanted to use it for our childrens future

How did Lisa help you?

She went through all the options with us, she explained very clearly how investments worked the risks and benefits and took time to understand what we wanted. She listened to us and put together the perfect plan for us. She never rushed or pressurised us and compared to other advisers we spoke to was very competitively priced.

Have you seen the outcome you were hoping for?

Absolutely we couldnt be more pleased.

What could they have done better?

Nothing.

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

I wanted to transfer an old final salary pension and release tax free cash.

How did Lisa help you?

Lisa guided me through what is an extremely complex process. At every stage she explained everything I should consider both the advantages and disadvantages In a way that was easy to understand. She listened to what I wanted to achieve and took tomeTo consider all the fact before making a recommendation. The trustees of the scheme were really difficult to get Information n from but Lisa handled This extremely well so I didnt miss my transfer deadline. Her analysis was extremely comprehensive but presented is simple way so I was very clear I

was making the right decision.

Have you seen the outcome you were hoping for?

Absolutely Ive been able to access my pension.

What could they have done better?

Nothing she's brilliant.

Review from Verified Client

London | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

After leaving my company I wanted advice on transferring my final salary pension.

How did Lisa help you?

Lisa was fanstastic she didnt try to convince me to leave the scheme, in fact she gave me many reasons why it may not be the best option and alternative solutions to achieve my goals. She didnt just look at the figures, she did an I Indepth analysis of the scheme and my personal circumstances and explained everything every step of the way to enable me to make an informed decision.

Have you seen the outcome you were hoping for?

Yes I successfully transferred my pension within the timescales of my CETV.

What could they have done better?

Nothing she was brilliant

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

My partner and I were looking to purchase a house and being self employed made it a little

more difficult than normal

How did Lisa help you?

Lisa was absolutely great! Helped us along every step of our journey, made life very simple and took all the work and stress out of the whole process

Have you seen the outcome you were hoping for?

Yes, we are happily settled in our lovely new home.

What could they have done better?

Honestly, Lisa did everything in her power to make it easy, and get us the deal that was best for us.

Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a financial adviser?

Lisa has been our adviser for a number of years. She regularly contacts us to keeps us updated with our pensions. Nothing is too much trouble for her.

How did Lisa help you?

Pensions review

Have you seen the outcome you were hoping for?

Absolutely! Our pensions are doing much better than they were before and for once we understand them!

Review from Verified Client

Northamptonshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I wanted to transfer my pension to a new provider which would facilitate flexi-access draw

down.

How did Lisa help you?

Lisa was highly professional and knowledgeable. Although i knew what i wanted to do, she did thorough research to make sure it was the best advice and to find the best solutions for me. Her service was friendly and efficient. She also completed a full review and was able to save us money on our mortgage which we didn't expect.

What is your current situation? Have you seen the outcome you were hoping for?

Yes we are extremely please, Lisa did a great job and improved our circumstance by more than me had hopped for. She kept us up to date with the process and made the whole thing stress free.

What could they have done better?

We wouldn't change anything shes fantastic.

Review from Verified Client

Warwickshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I wanted all my pensions to be transferred into one.

How did Lisa help you?

Lisa looked into all my pensions to make sure it was right for me to transfer them and then completed the process for me.

What is your current situation? Have you seen the outcome you were hoping for?

yes I now have one pension which is performing much better than any of my old ones were before. Lisa made the process quick and painless. She was professional and friendly. She kept me updated whilst they were being transferred and reviews my pension with me.

What could they have done better?

I wouldn't change anything she's brilliant.

Review from Verified Client

Warwickshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We were struggling to get a mortgage, a few banks had said they wouldn't lend to us and we were at risk of losing the house we wanted.

How did Lisa help you?

Lisa was amazing she very quickly found a lender that would lend us the money we required and came out to us to complete the application. She worked around our working hours and got everything done really quickly so we got the property we wanted.

What is your current situation? Have you seen the outcome you were hoping for?

Yes we honestly had given up hope of getting our house and Lisa saved the day!.

What could they have done better?

Nothing she went above and beyond to get everything done for us quickly.

Review from Verified Client

Manchester | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I wanted to set up a pension as I am self employed and didn't have one.

How did Lisa help you?

Lisa explained exactly how pensions worked and the options I had available. She also explained the other investment strategies that were available for my medium term plans.

What is your current situation? Have you seen the outcome you were hoping for?

Yes Lisa quickly set up the pension plan for and also an ISA, i'm really please with both and she regularly reviews them for me to make sure they are both on track.

What could they have done better?

Nothing her service was perfect.

Review from Verified Client

West Midlands | February 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

Life insurance.

How did Lisa help you?

She explained what was available to us and gave us a list of options. It was very confusing and time consuming prior to Lisa's help but she made it easy to understand. She was extremely professional but friendly at the same time.

What is your current situation? Have you seen the outcome you were hoping for?

Yes very happy with her suggestions.

What could they have done better?

Nothing. She was brilliant.

Review from Verified Client

Warwickshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I wanted a full financial review.

How did Lisa help you?

Lisa reviewed everything for us, our pensions, investments, life policies and mortgage. She was fantastic she came out over a few appointments and researched all of our existing plans for us. She really took the time to understand what we were trying to achieve and answered all our questions to an in depth level. It seems there is nothing she doesn't know!.

What is your current situation? Have you seen the outcome you were hoping for?

She exceeded our expectations. She saved us lots of money on our mortgage and life cover

policies. She has improved our investments and made them much more tax efficient and has made our pensions so much more easier to understand. she has streamlined our finances so we no longer have everything all over the place.

What could they have done better?

I honestly cant think of a single thing.

Review from Verified Client

Leicestershire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I am about to semi retire and wanted my pensions reviewing.

How did Lisa help you?

Lisa looked into all my pensions for me; I had 6 different ones, she transferred them all into one which I am able to access as and when I need to.

What is your current situation? Have you seen the outcome you were hoping for?

yes, she did extensive research on my behalf, explained everything really simply and kept me updated with what was going on.

What could they have done better?

I wouldn't change anything

Review from Verified Client

West Midlands | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We wanted to start regularly saving for our children's future.

How did Lisa help you?

Lisa explained the options we had available. she made sure our savings were tax efficient

and set up in the best way for our children's future. She explained all about how investments work and picked the best fund to match our needs.

What is your current situation? Have you seen the outcome you were hoping for?

We feel really happy with the investments Lisa has set up and they are performing really well.

What could they have done better?

nothing.

Review from Verified Client

Manchester | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We wanted to make sure our family and finances were properly protected.

How did Lisa help you?

Lisa completed a full review and explained the different ways we could be protected against different eventualities. She spent time researching the best cover for the cheapest cost.

What is your current situation? Have you seen the outcome you were hoping for?

Yes we now have the peace of mind that we would be in the best position should we become ill or if one of us died.

What could they have done better?

nothing.

Review from Verified Client

Warwickshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I had a pension from an old employer which my current employer wouldn't let me transfer to

them and I wanted to know what other options I had.

How did Lisa help you?

Lisa wrote to my existing provider and found out lots of information about my pension, she analysed the options the plan had within it, the performance of the fund, the risk level it was taking and the charges I was paying. She took time to understand my preferences and objectives and made recommendations of changes I could make to improve things.

What is your current situation? Have you seen the outcome you were hoping for?

I'm really please with Lisa's recommendations, her service was quick, friendly and professional. I now feel confident that my pension is now being managed in the best possible way and is working effectively for my retirement.

What could they have done better?

Lisa is great she really is on the ball, I never had to chase her for anything. she warm and friendly and explains things in a clear and simple way.

Review from Verified Client

Northamptonshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We were concerned that we had an inheritance tax liability.

How did Lisa help you?

Lisa explained how inheritance tax worked and the different options we had around it. She took the time to understand our priorities and to make sure we still had access to the funds we would need in the future. She explained everything to children as well which we were really pleased about.

What is your current situation? Have you seen the outcome you were hoping for?

Yes she has given us the peace of mind that our finances are now arranged in the most tax efficient way possible and our money is working hard for us in the short, medium and long term.

What could they have done better?

we wouldn't change anything, Lisa is lovely and professional and the best financial adviser

we have worked with (and there have been many over the years!)

Review from Verified Client

Leicestershire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We had built up savings over the years and wanted to invest this.

How did Lisa help you?

Lisa came out and talked us through all of our options. She really got to know us and understood exactly what we were trying to achieve. She educated us on how investments worked and established the level of risk we were comfortable with. She didn't rush us and was so friendly and patient.

What is your current situation? Have you seen the outcome you were hoping for?

Yes we are so pleased with the plans Lisa has put in place for us. Her service is professional and efficient. She is so knowledgeable but explains everything in a way which is easy to understand. The plans have performed fantastically.

What could they have done better?

Nothing. She always contacts us without us having to prompt her.

Review from Verified Client

Warwickshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

Moving house, remortgaging a buy to let.

How did Lisa help you?

Lisa understood everything I was looking for, and advised me across multiple financial products.

What is your current situation? Have you seen the outcome you were hoping for?

Yes. I have sorted all of my needs for the foreseeable future.

What could they have done better?

Nothing I could suggest.

Review from Verified Client

Worcestershire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I had recently become self employed and was struggling to get a mortgage, and had old occupational pensions which I wasn't sure what my options were with them.

How did Lisa help you?

Lisa was very knowledgeable and was quickly able to find me a mortgage. She made the whole process quick and easy. She also reviewed our existing pensions and transferred them for us so we are now in complete control of our retirement plans. She explained everything in clear and simple terms and communicated everything that was happening quickly. She regular reviews our plans and is always on hand to help us.

What is your current situation? Have you seen the outcome you were hoping for?

Yes and more than we expected. Lisa was a breath of fresh air. she got us a great deal on our mortgage and was so helpful around our pension. Our pension has performed so well since Lisa has looked into it for us and we understand them more than we ever have. We would never use anyone else for our finances now.

What could they have done better?

Nothing. She's brilliant.

Review from Verified Client

Leicestershire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We wanted to review our entire finances after receiving an inheritance.

How did Lisa help you?

We can't thank Lisa enough. We gave her a mammoth task of giving our finances a complete overhaul. She reviewed everything for us, our mortgage, insurances, investments, and pensions. She saved us so much money on our mortgage and protection and streamlined our finances. She made sure our pensions were all in the right place and linked all our plans to what we wanted to achieve for the future. She help us put money into trust for the children and did everything at a pace we felt comfortable with.

What is your current situation? Have you seen the outcome you were hoping for?

We are over the moon with Lisa's service. She was so patient with us and we never felt rushed. She explained all the options and helped us understand what we had and how we could improve things. She has set our finances up for now and for the future. She regular reviews things with us and always with a smile.

What could they have done better?

We couldn't think of one thing we would change.

Review from Verified Client

Leicestershire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We received a lump sum and didn't know what to do with it.

How did Lisa help you?

She came over and completed a full review, she listened to exactly what we wanted and put together a plan which we were completely comfortable with. She explained everything really clearly and worked at a pace we were happy with. She was very friendly and we instantly felt relaxed with her. Since setting up our investments she has regularly reviewed them.

What is your current situation? Have you seen the outcome you were hoping for?

We are really pleased with our investments, they are performing excellently and Lisa's service has been friendly, professional and consistent.

What could they have done better?

We wouldn't change anything.

Review from Verified Client

Northamptonshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I had 5 different pensions from different jobs.

How did Lisa help you?

Lisa reviewed these pensions and transferred them all into one better scheme which accommodates the new pension rules so i will be able to access this money when i turn 55, and all my money is in one fund.

What is your current situation? Have you seen the outcome you were hoping for?

Yes i now feel reassured my pension funds are in the right place and they are performing much better now, Lisa regularly updates me on how they are doing. The charges are now much lower than what i was paying before, and everything is much easier to understand and manage.

What could they have done better?

I wouldn't change anything. Lisa is friendly and professional and efficient.

Review from Verified Client

West Midlands | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

Our fixed rate deal had ended and we wanted to find a better rate.

How did Lisa help you?

Lisa researched the whole market place and managed to find us a much better rate than we had been offered from our bank. She dealt with everything so quickly, it was so easy!.

What is your current situation? Have you seen the outcome you were hoping for?

We were so pleased and surprised about how simple the process was, we didn't even need to leave the house! Lisa also managed to save us lots of money on our life insurance.

What could they have done better?

The service was flawless, we will definitely use her again when our rate ends and recommend her to everyone we know.

Review from Verified Client

Warwickshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

Over the years we have used Lisa for all our financial needs.

How did Lisa help you?

She has helped us arrange mortgages, life insurance, set up savings accounts for our children, investments for our future and improved our pensions by amalgamating all the different plans we had. She is an absolute star. Nothing is too much trouble for her and she often calls just to touch base with us.

What is your current situation? Have you seen the outcome you were hoping for?

Yes our finances are so simple and easy to understand, we have different investments for our different needs and are also kept up to date with how they are going. She always makes sure we have the best investment for our needs and that we are investing tax efficiently. She has help us move twice and makes the processes so relaxed.

What could they have done better?

We wouldn't change anything she is always one step ahead and nothing is ever too much trouble.

Review from Verified Client

West Midlands | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We wanted to review all of our finances as we had lots of different pensions and investments which we hadn't looked at for a while.

How did Lisa help you?

Lisa was so helpful, she took the time to get to know us and understand exactly what we wanted to achieve with our money. She looked through all of our existing arrangements, wrote to all the companies to research all the details of our investments and pensions and then made recommendations of how we could improve things.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, we now have a much more streamlined approach to our finances, we know exactly what we have and understand how it all works. We have seen much greater returns on our money since Lisa has been looking after them for us and she regularly meets up with us to review them with us.

What could they have done better?

Nothing she was so patient us, she like one of the family now!

Review from Verified Client

West Midlands | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We had been told we couldn't borrow the amount we needed from a few banks.

How did Lisa help you?

Lisa researched lots of mortgage lenders and was able to find one who would lend us exactly what we needed at a great rate. She came out to us and did all the paper work quickly and explained everything in simple terms. She contact us every step of the way and worked with our solicitor and estate agent to make sure everything went smoothly.

What is your current situation? Have you seen the outcome you were hoping for?

Definitely if it wasn't for Lisa we wouldn't have been able to move to our dream house.

What could they have done better?

I wouldn't change anything she was brilliant and so genuine and friendly.

Review from Verified Client

Herefordshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We had lots of different investments which we had taken out years ago with various banks and advisers but hadn't been able to review and didn't understand what we had.

How did Lisa help you?

Lisa was fantastic, she researched our investments and explained them in a way that was easy to understand. She was so friendly and took the time to understand what we wanted to achieve with our money and put together a plan to match this.

What is your current situation? Have you seen the outcome you were hoping for?

Yes! She streamlined our investment so they are simple to understand and performing much better than they were before, she's made our money more tax efficient and regularly contacts us to review everything with us.

What could they have done better?

Nothing she's the best adviser we have ever used and will never use anyone else now.

Review from Verified Client

Warwickshire | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

Pension advice to get the best deal.

How did Lisa help you?

Explained the options available to me and helped me understand what would be best for my situation.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

London | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I required assistance in a number of money related matters and wanted to find one person who could offer me advice and services. That was no easy task. With every bank and insurer telling me their mortgage products are the best and their insurance products are the I found it difficult to gain any transparency.

How did Lisa help you?

She offered advice on my entire financial situation helping me wade my way through the options and find products and services that best suited my needs.

What is your current situation? Have you seen the outcome you were hoping for?

Yes!.

What could they have done better?

I don't have any criticism and will continue to use Lisa's services.

Review from Verified Client

Warwickshire | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

Over the years i had built up a few different pensions and i wanted advice on what to do with them.

How did Lisa help you?

Lisa was brilliant. She contacted my providers and researched everything about my existing pensions to make sure she was giving me the best advice. She explained everything and presented all my options in a clear and simple way.

What is your current situation? Have you seen the outcome you were hoping for?

I now have one pension rather than lots of different ones which I know is invested in the best possible way for me and that I will be able to access when I need it in the future.

What could they have done better?

I really wouldn't change anything. Lisa is so knowledgeable and professional and most importantly down to earth! I have recommended her to everyone I know!

Review from Verified Client

Warwickshire | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I needed life insurance and critical illness cover for my mortgage.

How did Lisa help you?

Lisa made sure she found the very best cover for the cheapest price and explained exactly how the plans worked for me.

What is your current situation? Have you seen the outcome you were hoping for?

I had previously been declined for cover so I was so pleased that Lisa was able to research the market and find a provider that would protect my mortgage. She made the process quick and easy.

What could they have done better?

Nothing

Review from Verified Client

Warwickshire | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I had received an inheritance and wasn't sure how best to invest it.

How did Lisa help you?

Lisa was amazing. She spent a long time listening to my circumstances and understanding exactly what I wanted this money to do for me. She then spent time explaining how investments work and all the options I had, she explained risk and helped me understand what I did and didn't feel comfortable with. She allowed me to set the pace and came back over a few appointments until I was completely happy with everything.

What is your current situation? Have you seen the outcome you were hoping for?

She put together a plan which means I have different pots of money which I can access at different times in the future and ensured my money was tax efficient for me. She's always available at the end of the phone and reviews my investments with me regularly. I am so pleased with my investments and feel I really understand what I have and have been amazed at the performance of my money.

What could they have done better?

Nothing I feel really lucky to have Lisa as my adviser.

Review from Verified Client

West Midlands | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

We needed to get a mortgage to buy a bigger property.

How did Lisa help you?

Lisa worked tirelessly to ensure we got a mortgage offer within the timescales set by the property developers. She researched the whole market to get us the best rates and explained everything every step of the way. She was always available when we needed her and she liaised with our builders, estate agents and solicitors to make sure that everything

ran smoothly.

What is your current situation? Have you seen the outcome you were hoping for?

We are so pleased with the service provided by Lisa she did everything so quickly and efficiently and made the process so easy for us. We got the house of our dreams and the best mortgage rate out there!.

What could they have done better?

Nothing her service was flawless.

Review from Verified Client

Warwickshire | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

What were the circumstances that caused you to look for a Financial adviser?

I had various pensions from old employers which I didn't know what to do with.

How did Lisa help you?

Lisa explained exactly how pensions worked and all the options available to me, she spent a lot of time researching the best solutions for me and presented them in a way which was really easy to understand. She took the time to really understand exactly what I wanted and was friendly and professional. She regularly reviews my pensions to make sure they still suit my needs. She is a pleasure to work with!.

What is your current situation? Have you seen the outcome you were hoping for?

Lisa made the process of transferring my pensions so easy and I feel I understand them more than I ever have done before. I don't worry about my retirement anymore as I am 100% confident Lisa has put together the best plan for me.

What could they have done better?

Nothing she was the perfect adviser!
