

# MARK MANNING

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Background report to support inclusion  
in the **2024 Guide To The UK's Top  
Rated Financial Advisers**



Mark Manning

Safehands IFA

 Top Rated 2024

4.8 / 5  148 reviews

## VouchedFor checks:

 FCA Regulated






 Independent Financial Adviser

 Qualifications Uploaded

 Transparent Fees

 Positive First Impressions

## Services offered

-  Investments and Savings
-  Pensions
-  Retirement income (annuities, drawdown)
-  Inheritance Planning
-  Insurance & Protection

## Qualifications listed

**Standard Qualifications: 1 Qualification**

IFS - Statement of Professional Standing (SPS)

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

## Client Reviews

### Mark Manning

Safehands IFA



4.8 out of 5

Review from Verified Client

Gloucestershire | July 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted a health check of my pension

**How has Mark helped you?**

Mark produced clear advice aligned to my priorities. When presenting this advice, he adjusted the advice tactically in response to our conversation.

**Have you seen the outcome you were hoping for?**

It's too early to say

**What could they have done better?**

Nothing I can think of

Review from Verified Client

Gloucestershire | March 2023

★★★★☆ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Wanted to impact my pensions

**How has Mark helped you?**

As above

**Have you seen the outcome you were hoping for?**

Yes very happy with results

**What could they have done better?**

Not sure

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Review from Verified Client

Gloucestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We had a substantial amount of money which we wanted to invest.

**How has Mark helped you?**

By giving professional advise that was tailored to our needs.

**Have you seen the outcome you were hoping for?**

Yes.

**What could they have done better?**

Nothing as more than happy.

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Review from Verified Client

East Sussex | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed direction for pension and savings

## How has Mark helped you?

Excellent advice and support Always keen to discuss our thoughts and principles and relate this to the accounts

## Have you seen the outcome you were hoping for?

Yes

## What could they have done better?

Nothing

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Review from Verified Client

Worcestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Savings investment.

## How has Mark helped you?

Been readily available whenever called upon, listened carefully to circumstances and offered sensible, tailored choices.

## Have you seen the outcome you were hoping for?

Yes - a steady, profitable growth over the period.

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Review from Verified Client

Worcestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Savings investments.

## How has Mark helped you?

Been readily available whenever called upon, listened carefully to circumstances and offered

sensible, tailored choices.

## Have you seen the outcome you were hoping for?

Yes - a steady, profitable growth over the period.

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Review from Verified Client

Gloucestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Savings and investing for the future

## How has Mark helped you?

Advice has been given that is thorough and considered. Mark explains complex financial information in a way that we understand and allows us to make a decision when we are comfortable. No hard sell involved.

## Have you seen the outcome you were hoping for?

Yes

## What could they have done better?

Nothing

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Review from Verified Client

Gloucestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to set up a pension & had some money I wanted to invest

## How has Mark helped you?

Friendly , down to earth help & advised taylored to my personal needs

**Have you seen the outcome you were hoping for?**

Yes

**What could they have done better?**

Nothing

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Review from Verified Client

Gloucestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

After my previous IFA retired I was looking for a new one. Mark was recommended to me by our mortgage advisor.

**How has Mark helped you?**

Mark has always been very diligent when looking after my private pension plan.

**Have you seen the outcome you were hoping for?**

Yes

**What could they have done better?**

Nothing that I can think of.

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Review from Verified Client

Gloucestershire | March 2023

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★☆☆

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

I did not specifically look for an advisor. My wife worked for an IFA, and, it seemed a natural progression to use them.

**How has Mark helped you?**

I trust him to invest our small monies in a position that gives me some sort of return.

**Have you seen the outcome you were hoping for?**

In the main, Yes.

**What could they have done better?**

I am not financially astute to answer that question!

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Review from Verified Client

Gloucestershire | March 2023

★★★★★ 4.7 out of 5

Value: ★★★★★☆

Service: ★★★★★

Advice: ★★★★★

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

needed to sort out various pensions and savings and investments

**How has Mark helped you?**

given us options that would best suit our circumstances for pensions and investments.

**Have you seen the outcome you were hoping for?**

yes

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Review from Verified Client

Gloucestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Approaching Retirement

**How has Mark helped you?**

Invested my funds such that they increase in value

**Have you seen the outcome you were hoping for?**

Yes

**What could they have done better?**



Don't Know

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Review from Verified Client

Gloucestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

On my retirement from employment I sought out Mark Manning (via online reviews) to oversee a pension transfer to a subsequent drawdown arrangement.

**How has Mark helped you?**

Mark invited me to an initial meeting to discuss my options. He made me aware of the possible risks involved with each recommendation.

**Have you seen the outcome you were hoping for?**

Yes, absolutely.

**What could they have done better?**

No

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Review from Verified Client

Cornwall | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We needed advice and support to make decisions for investments.

**How has Mark helped you?**

Over nearly 20 years we have seen good rewards on our investments. We have regular reviews and the advice reflects the variances in the markets.

**Have you seen the outcome you were hoping for?**

Yes, definitely.

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Review from Verified Client

Derbyshire | October 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Mark again advised the transfer of my annual tax free allowance from my capital to the Stocks and Shares ISA. He also advised how to apportion legacies to the different beneficiaries so now can re-write my Will.

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Review from Verified Client

Herefordshire | April 2022

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Early retirement

### How has Mark helped you?

By providing sound advice and the facility to invest pension lump sums wisely

### Have you seen the outcome you were hoping for?

Yes given the volatile financial environment of recent years.

### What could they have done better?

Flat fees charged for the transfer of small investments seemed a little disproportionate when a sliding scale would have been more acceptable. Having said this the use of Mark's discretion over the application of fees on subsequent transfers is most welcome.

Review from Verified Client

Dorset | January 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

## How has Mark helped you since your last review?

Marks advise has always been honest, fair and most importantly I have felt secure knowing that it has always been aimed at MY best interests. I have recommended him to 4 of my closest friends so clearly I think his advice is very good.

Review from Verified Client  
Cornwall | November 2021  
★★★★★ 5 out of 5

Value: ★★★★★ Advice: ★★★★★ Service: ★★★★★

## How has Mark helped you since your last review?

Mark is always responsive to any queries I may have between reviews.

Review from Verified Client

Gloucestershire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

## How has Mark helped you since your last review?

Mark has reviewed our retirement income requirements and provided assurance over a long term strategy by moving to a new approach which we can easily see will benefit ourselves. This has been achieved by Mark taking time to totally understand our requirement along with his wide knowledge of different platform offering. At all times Mark ensures we have time to ask the "Silly" question and understand the options.

Review from Verified Client

Gloucestershire | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

## How has Mark helped you since your last review?

Although this has been a difficult time for the financial markets Mark's advice has been excellent

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Review from Verified Client

Derbyshire | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

## How has Mark helped you since your last review?

Mark's advice from last year has worked well and I have been able to still live comfortably on the reduced draw down income from investments. He agreed with me that I continue with that strategy for a few months and then if needed the draw down could be increased if needed. Again he advised to transfer from capital my annual tax free allowance to my Stocks and Shares ISA. he also explained the Ethical Investment Scheme and said he found that such investments were performing well and asked if I would be interested in changing to those investments. I agreed and said he would research investments to match my attitude to risk. He still respects my slightly hesitant approach to investment risks especially in view of the high increase expected for gas and electricity.

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Review from Verified Client

Herefordshire | October 2021

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

## How has Mark helped you since your last review?

Very good and timely advice relating to both existing and new investments. The recent seminar on ethical investments was an excellent new development which we hope will become a regular opportunity to learn more about financial planning in general.

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Review from Verified Client

Dorset | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

My investments have continued to grow at a satisfactory and in a safe way

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Review from Verified Client

Devon | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Mark has reassured us during this very difficult time, putting a statement out early on during the COVID crisis. As the pandemic continued and the markets contracted Mark continued to keep us calm with a reassuring email from time to time. We were offered our annual review which we initially deferred and when we were ready this was arranged without fuss and at our convenience. Totally satisfied with the services provided.

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Review from Verified Client

Cornwall | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

As above - Mark still provides a high quality service

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Review from Verified Client

Gloucestershire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Mark has continued to give advice and assurances around our investments, he has been proactive in arranging reviews in line with our personal targets and requirements. In a year of sometimes turbulent financial markets its great to have someone who not only knows your personal situation but provides timely advice which you can trust.

Review from Verified Client

Derbyshire | October 2020

★★★★★ 5 out of 5

Value: ★★★★★

Service: ★★★★★

Advice: ★★★★★

### How has Mark helped you since your last review?

Due to the current worldwide and national economic climate the advice was to stay put with current investments as all investments are subject to little or no growth and interest rates are almost nil. He was confident that soon there will be a recovery and fairly rapid too. He also suggested that as my expenditure over the past six months has very much reduced to reduce my draw down income from investments to, at least temporarily, increase invested capital in anticipation of future financial recovery. At any time should I find the need to increase the income that can be done at any time. He also advised to transfer from capital my annual tax free allowance to my Stocks and Shares ISA. As usual he did not pressurise me to go beyond what I felt comfortable with regard to investment risk.

Review from Verified Client

Gloucestershire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Continues to provide excellent service and advice.

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Review from Verified Client

Herefordshire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Mark has offered continuous reassurance, support and advice during a very difficult period. He has meticulously followed up all issues raised during our annual review and I am confident that he always acts in our best interest.

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Review from Verified Client

Gloucestershire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Always staying in touch to see if we need any further help

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Review from Verified Client

Gloucestershire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Great service. Very knowledgeable and has got us an affordable and very beneficial product

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Review from Verified Client

Wiltshire | October 2020

★ ★ ☆ ☆ ☆ 1.7 out of 5

Advice: ★ ★ ☆ ☆ ☆

Service: ★ ☆ ☆ ☆ ☆

Value: ★ ★ ☆ ☆ ☆

### How has Mark helped you since your last review?

Hi Mark, we made an appointment for a telephone review, this did not take place as you stated that you didn't have my contact number even though I specifically emailed it to you prior to our arranged meeting. Your secretary then made another appointment which she subsequently cancelled when she realised it was a Bank holiday. I have not had any further appointment to have this review

Review from Verified Client

Warwickshire | September 2020

★ ★ ★ ★ ★ 5 out of 5

Advice: ★ ★ ★ ★ ★

Service: ★ ★ ★ ★ ★

Value: ★ ★ ★ ★ ★

### How has Mark helped you since your last review?

I have not requested or needed any further so there is little I can add to my previous review.

Review from Verified Client

Gloucestershire | August 2020

★ ★ ★ ★ ★ 4.7 out of 5

Advice: ★ ★ ★ ★ ★

Service: ★ ★ ★ ★ ★

Value: ★ ★ ★ ★ ☆

### How has Mark helped you since your last review?

Kept me informed of pension performance and advised about any alterations required



Review from Verified Client

Gloucestershire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Mark helped you since your last review?**

The original intended target has been achieved and I am happy with the outcome.

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Review from Verified Client

Gloucestershire | May 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Mark helped you since your last review?**

Clear explanation of current global financial situation.

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Review from Verified Client

Gloucestershire | May 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Mark helped you since your last review?**

been clear and realistic with advise in difficult times

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Review from Verified Client

Devon | December 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Mark helped you since your last review?**

Mark has continued to help us with our financial plans. The advice has always been sound

with our interests at heart giving us the continued reassurance in these uncertain times

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Review from Verified Client

Cornwall | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Mark is always timely in his response to any query that we may have, and he has always given us very sound advice.

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Review from Verified Client

Gloucestershire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Discussed post working financial potential issues and solutions. Helped to understand the current Brexit context and made suggestions for diversification.

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Review from Verified Client

Bristol | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Yes, Mark has helped me massively in securing a solid financial portfolio maximising its potential.

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Review from Verified Client

Gloucestershire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Disappointed with service from previous adviser.....Mr Manning was recommended by a friend and in a Times article

### How has Mark helped you?

sound advice on investment and pension

### Have you seen the outcome you were hoping for?

so far...so good in testing times

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Review from Verified Client

Gloucestershire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Mark helped you since your last review?

Mark and his team provided excellent advice and managed the transfer of 2 work pensions into new investment funds enabling a seamless transition into retirement without any problems. Mark was always available to answer any of our questions and we were kept informed at each stage of the process which gave us total re assurance at a time of major change to our life.

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Review from Verified Client

Worcestershire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted good advice about how to use my pensions to retire early and to maximise income and savings.

### How has Mark helped you?

He provided current information, explaining choices and options in easy to understand ways. He provided clear strengths and weaknesses of our options yet enabled and supported us to make our own decisions. Once we had decided on our options, he supported the various applications/contacts to deliver what we wanted to do.

### Have you seen the outcome you were hoping for?

I have been able to retire early, maximising our income for the period when I will be eligible for a state pension. This includes investments which are ethical as well.

### What could they have done better?

We have no suggestions as we found that Mark provided the service that we required.

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Review from Verified Client

Herefordshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Redundancy retirement provided the opportunity to invest a tax-free lump sum for medium term growth with the option for income generation to supplement my pension after 4-5 years.

### How has Mark helped you?

Mark carried out a thorough assessment of my circumstances and discussed various options to maximise the benefit from my redundancy retirement settlement. This resulted in the setting up of an appropriate ethical investment portfolio with ongoing support from Mark to ensure all future financial decisions are well-informed. Mark also provided help with the updating of wills for my wife and I.

### Have you seen the outcome you were hoping for?

While it is too early to comment on the performance of the investment portfolio I am confident that the options selected are the most appropriate and I am both pleased and at ease with the current location of my capital. Whenever I contact Mark or another member of his team for advice or information there is always a prompt and full response.

## What could they have done better?

Had difficulty reading Mark's hand-writing on the will proposal form but he did apologise for this in advance!

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Review from Verified Client

Berkshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Having children - wanting to make sure we had enough pension when I retired; making sure we had life insurance; setting up savings accounts for our children.

## How has Mark helped you?

He analysed our pensions and gave us advice on how to proceed in order to provide a little more in our pension pot; set up life insurance for us and set up savings accounts for our children.

## Have you seen the outcome you were hoping for?

Everything is in place.

## What could they have done better?

I thought Mark provided excellent advice. We appreciated the time he took to explain difficult subjects with us.

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Review from Verified Client

Warwickshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We ere long overdue a pension review.

## How has Mark helped you?

He very patiently reviewed all our current circumstances and looked at the various pensions we have. He reviewed all the financial data and has made recommendations going forward which we have acted upon.

**Have you seen the outcome you were hoping for?**

All the transfers have been completed where applicable.

**What could they have done better?**

Mark was very helpful and patient. I genuinely cannot think of anything that he could have done better.

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Review from Verified Client

Devon | November 2018

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed financial advice with investments, mortgage and pensions

**How has Mark helped you?**

We have known Mark for many years now and he has given us the advice and reassurance of what to do next with our financial planning. He has been there at important stages in recent years when our circumstances have changed with retirement and the need to invest and secure our future.

**Have you seen the outcome you were hoping for?**

Mark has always given honest, clear advice without giving false promises. Mark is always contactable to answer any queries.

**What could they have done better?**

nothing, very happy with the service provided

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Review from Verified Client

Gloucestershire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Investing monies from divorce settlement to allow monthly income and flexibility to withdraw additional monies if required

### How has Mark helped you?

Advantage/disadvantage of various options of investment. Low/high risk options. Best options for my personal requirements/situation.

### Have you seen the outcome you were hoping for?

Yes. However at present the market is poor which has a negative effect on my investments. Hoping for improvement in market. This possibility was explained by Mark and I understood the risk when investing my monies.

### What could they have done better?

I feel for my personal situation all aspects of low/medium risk investments, with flexibility and draw down ability were explained.

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Review from Verified Client

Derbyshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Fourteen years ago when I was approaching retirement the county council I was working for provided pre-retirement financial advice from an IFA which over the years changed hands several times eventually becoming Safehands in Cheltenham. Having previously received good advice from Mark whilst he worked with the previous IFA's I wanted him to continue being my advisor when he established Safehands and he agreed.

### How has Mark helped you?

Initially I had an extremely small capital sum to invest and the advice he gave me provided me with a good return to supplement my state pension and minute company pension. Recently I

received a good settlement from contesting a Will and the advice he has given on that investment has yielded a monthly income which has vastly improved my financial situation so that I can live reasonably well.

**Have you seen the outcome you were hoping for?**

Definitely

**What could they have done better?**

I can't think of anything Mark could have done better - he obviously knows the markets.

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Review from Verified Client

Gloucestershire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Preparing Financially for Retirement

**How has Mark helped you?**

Clear Information

**Have you seen the outcome you were hoping for?**

No Problems, The stockmarket decides the outcome, Safehand's selection of products performs as I would expect

**What could they have done better?**

I consider that Mark's advice is pragmatic thus keep up the good information.

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Review from Verified Client

Hampshire | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was recently divorced and received a lump sum settlement. It was essential that I invested



this money to bring a safe but good monthly return to boost my self employed income.

### How did Mark help you?

Mark guided me through the process making sure I always understood the process and ensuring I was only taking the risks I felt entirely comfortable with. I am not confident when it comes to investments and Mark didn't once make me feel silly or worried.

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

Most definitely!.

### What could they have done better?

I really like Marks approach so personally wouldn't change anything.

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Review from Verified Client

Gloucestershire | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Getting my investments sorted out and better organised. Also needed to do some planning for the future.

### How did Mark help you?

Made some recommendations and suggestions explained things clearly and simply. Quickly understood my needs and worked within these boundaries. Patient with all the questions i asked to clarify, even when they were probably very obvious to him.

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

Think so, although still some follow up required. Regular update emails though to keep me informed of progress and very solution focused when we came to the odd bump in the road. Feel that my investments are in a better place as a consequence of working with Mark and taking his recommendations.

### What could they have done better?

Happy so far so not able to make any suggestions.

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Review from Verified Client

Bristol | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was getting old enough and had enough money to warrant having a financial advisor.

**How did Mark help you?**

Mark was very good and sat me down and talked me through every option available. He described each option so that I was able to understand.

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

My investments have made excellent returns.

**What could they have done better?**

Mark couldn't have done nothing better. The only downside is the lead in time to get an appointment.

---

Review from Verified Client

Gloucestershire | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Planing retirement.

**How did Mark help you?**

Everything was explained in terms we could understand.

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

Yes.

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Review from Verified Client

Gloucestershire | October 2018

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Consistently good service.

**How did Mark help you?**

Redirect funds to higher yielding funds management.

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

Within expectations.

**What could they have done better?**

No comment

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Review from Verified Client

Gloucestershire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had been building up money in a SIPP and had reached an age at which I thought I might be able to retire.

**How did Mark help you?**

Mark provided advice on my options for receiving income during my retirement. Based on the value of the money in my SIPP, Mark was able to advise on how much income the different options were likely to provide. He also checked on my attitude to risk as that is obviously a key factor. After receiving Mark's advice I decided to take on a drawdown arrangement which seemed to fit my needs best.

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

The advice Mark provided was clear and very helpful. The outcome is very much as I was hoping it would be. I now have a monthly income at a level that I am happy with and so far my investments are accumulating nicely.

## What could they have done better?

I can't think of anything that could be improved that would make any real difference. I was very happy with the initial meetings that I had with Mark.

---

Review from Verified Client

Cornwall | June 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to release some of my pension fund.

## How did Mark help you?

Mark advised, organised and co-ordinated the whole process.

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

Yes.

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Review from Verified Client

Gloucestershire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

looking to combine several pensions all together.

## How did Mark help you?

looked at what i had and discussed the best way to benefit from his advice.

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

yes.

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Review from Verified Client

Gloucestershire | June 2017

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We had inherited a sum of money and wanted advice with regard to investments to promote a good return and to also look at using these fund to top up our pensions.

### How did Mark help you?

Mark helped us to really think about what we were hoping to achieve financially in the future and from that point then helped us to consider our financial options. He clearly explained all the different options available and their implications so we could make well informed decisions. We felt very comfortable with the whole process.

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

We were very happy with the initial meeting the financial review and the output report produced with all recommendations. Once we had made our investment decisions Mark made the process very easy and clearly explained each stage and applicable timings / charges etc. It was all very transparent and we felt in control the whole time and are happy with the products recommended.

### What could they have done better?

We were very happy with Mark's approach so are unable to think of anything he could have done better other than be a Liverpool FC supporter (in my husbands opinion).

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Review from Verified Client

Worcestershire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Had money to invest.

### How did Mark help you?

Advised on how best to invest our money.

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

Yes.

**What could they have done better?**

Nothing

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Review from Verified Client

Berkshire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was aged 57, approaching retirement, with several pensions with various options and underperforming investments. I needed advice and assistance on my financial situation, both at the current time through my retirement and going forwards for the next twenty to thirty years, plus I also need to ensure my wife would be financially looked after and advised if I were no longer around.

**How did Mark help you?**

Mark has carried out an appraisal of my situation and listened to my requirements and he has advised me the best course of action to take, and after I have agreed, Mark has provided the knowledge and expertise to enable my requirements to be actioned.

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

In my opinion this is not easy question to answer. I am now into standard and stable investments that I would not be able to access without an IFA. I am very happy when I compare what I have achieved with Mark compared to what I could manage by my own (and poorly performing bank assisted) investments for the previous five years. I now have in place an investment strategy for the short and long term and I have a trusted person whom I can call on as and when I need further advice.

**What could they have done better?**

My difficulty is that if I hire a plumber to fit a bathroom I can see a tangible asset that I pay for. With advice, you need to trust your IFA and you need to be truthful about your situation and your future aspirations. Then you get advice and you get guidance and you get access to investments that are not accessible to a layperson. You need to meet with and trust your IFA. Once you make that decision then you move forwards until you do not feel your IFA is

performing the best for you. For me Mark gave me a sense of trust, did not rush into things, allowed me to build on the relationship by assisting with a part of my assets, was there for me when I became worried about my decisions, reassured me of my doubts, then stays in the background until I need him or until our review times, so basically Mark couldn't have done anything better.

---

Review from Verified Client

Gloucestershire | June 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I was looking for a financial adviser to help me find a pension to transfer a share of an occupational pension into following a divorce.

### How did Mark help you?

Mark listened to my requirements and future financial plans. He established my attitude to risk and thoroughly explained all of my options. He searched the market for the most appropriate fund. Mark and his team ensured that the transfer went ahead smoothly and kept me informed throughout the process.

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

Yes, the pension share was successfully transferred.

### What could they have done better?

Mark and his team were brilliant. They were really helpful and professional during a very difficult time. It was much appreciated.

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Review from Verified Client

Gloucestershire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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



Advice required to manage maturing insurance policies and pension funds.

## How did Mark help you?

Mark detailed all the options and advised and guided my final choice of investments.

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

Yes - at present very satisfied.

## What could they have done better?

Nothing that I am aware of.

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Review from Verified Client

Gloucestershire | June 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Value: ★★★★★☆

Service: ★★★★★

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

Approaching age 55 , needed advice on SIPP and how best to maximise its performance.

## How did Mark help you?

He set out all options available to me , which we then discussed and agreed which way to go.

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

Its early days for an outcome but I am happy with the way things have gone so far.

---

Review from Verified Client

Gloucestershire | May 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Management of pension fund.

## How did Mark help you?

Mark gave excellent clear guidance of the investment options available.

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

After 15 months the agreed investment fund has far exceeded my expectations.

**What could they have done better?**

Mark could not have been more helpful or professional

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Review from Verified Client

Devon | June 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Not satisfied with my Pension provider at the time.

**How did Mark help you?**

Evaluated the situation and recommended a solution.

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

Yes, I was quite happy to follow my advisers recommendations.

**What could they have done better?**

I have no problem my Financial advisers performance

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Review from Verified Client

Gloucestershire | June 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Early retirement due to redundancy.

**How did Mark help you?**

Mark guided me through all available options and presented details in a easy to understand manor.

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

Yes, thanks to marks diligence we achieved our objective.

**What could they have done better?**

Nothing

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Review from Verified Client

Hampshire | May 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I am divorced and needed to invest my capitalised lump sum.

**How did Mark help you?**

Mark explained in a careful but not at all patronising way everything I needed to know about the ways to invest my money. He gave me confidence in how investments are made to manage risk as much as possible for my needs. He was friendly but also very professional in his approach.

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

Everything has been set up exactly as we discussed and I feel very pleased with my decisions.

**What could they have done better?**

As this is my first experience dealing with a financial adviser, I can only say everything seemed very well done.

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Review from Verified Client

Gloucestershire | May 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

looking to invest inherited money.

## How did Mark help you?

Gave me clear and sound advise after a thorough and informal discussion .

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

It,s early days yet but I feel confident of a positive result.

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Review from Verified Client  
Devon | March 2016  
★★★★★ 5 out of 5

.58417.182.5.947a1.5.1.5.0.0.1.491.1.4871.2.348.9.1a1.447.1.447.0.0.0.2.172.1.59317.813-5.062a1.362.1.362.0.0.1.1.541.017.848.5.062a1.447.1.447.0.0.0.2.172-1.5931-2.348-9.062A1.462.1.462.0.0.1.225.52.19.761Z"

transform="translate(-199.939 0)" fill="#4BC1CA" /> ★★★★★

Advice: ★★★★★  
Service: ★★★★★  
Value: ★★★★★

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

My Section 32 Buy Out Bond with Aviva was due to mature and I wanted to convert it to a Flexi-Access Drawdown Plan.

## How did Mark help you?

Mark reviewed my requirements, recommended funds to invest in, set up a plan with Fidelity Funds Network and proceeded with the transfer.

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

Through no fault of Mark unfortunately not. At the eleventh hour Aviva reduced their annuity rates which meant my pension pot was insufficient to buy the GMP so a transfer to a FAD plan was not allowed. Aviva would now only pay the GMP as required. Mark arranged a transfer of my pot to Canada Life who through better annuity rates now pays my GMP and also paid a 10k tax free lump sum.

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Review from Verified Client

Worcestershire | January 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement age reached.

## How did Mark help you?

Gave sound advice on drawdown and our options.

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

Yes.

## What could they have done better?

In this case, nothing. We sought advice, which was given and our outcome met our expectations.

---

Review from Verified Client

Gloucestershire | October 2015

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★☆☆

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

The need for someone to give me information about the options available and best return on investments to enable me to have financial security.

## How did Mark help you?

Mark gave me the information and options available.

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

I am now drawing on my investments to top up my pension.

## What could they have done better?

Mark provided clear information, carried out all the necessary paperwork. I feel he handled everything well, saving me from the stress and making possibly not making the most out of my finances.

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Review from Verified Client

Warwickshire | October 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To provide for my retirement, using a long term investment method.

## How did Mark help you?

He helped by providing me with details of the best options available to me and also made me understand the types of investment available to me. As a first time investor, Mark really made the process very clear, simple and easy to understand.

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

My investment has only recently been completed so it is difficult to say how things are progressing.

## What could they have done better?

From my point of view, I do not believe Mark could do anything better. He has been very helpful and friendly, very approachable and nothing is too much trouble for him.

---

Review from Verified Client

Worcestershire | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Savings and then pension lump sum investment planning.

## How did Mark help you?

Mark has been responsible for the planning of savings/investments for myself and wife for a number of years - prior to and subsequent of my retirement. Mark has always been professional, friendly and sensible with his advice. He listens to, and considers both our needs and wishes and this has resulted in excellent returns for us.

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

I am currently retired and about to receive a State Pension - Mark has recently discussed and advised concerning this.

---

Review from Verified Client

Gloucestershire | August 2015

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Forthcoming retirement.

**How did Mark help you?**

Advise on Pension options after obtaining a number of quotations.

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

Pension plans completed to my satisfaction.

**What could they have done better?**

I believe that all options in my situation were considered and nothing was missed.

---

Review from Verified Client

Gloucestershire | June 2015

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Advised by the company who held a couple of my Pension funds to seek advice from an independent source because of what I was hoping to do with my funds.

**How did Mark help you?**

On the first meeting we discussed my objectives, but because of the coming rule changes it was agreed that I arranged another meeting nearer the date of the rule changes. On the second meeting we discussed my options now the new rules were due in, and came to an agreement on the way forward.

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

Mark sorted my pension out as agreed, and hopefully I will see the benefit of this in time.

**What could they have done better?**

I was very pleased with each of the meetings I had with Mark and the advice given, he was easy to talk too, I was happy with his advice.

---

Review from Verified Client

Gloucestershire | April 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

mark has been out to our house to conduct business with us which was a nice touch mark was also very friendly good advice thank you mark

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Review from Verified Client

East Sussex | December 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Th pension advice we received was well researched, relevant to our needs, and understandable.

**What could they have done better?**

Hard to find fault.

---

Review from Verified Client

Gloucestershire | October 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

From our first meeting Mark demonstrated his knowledge of the financial services business and took time to listen to us fully to make sure he understood both our short and long term requirements before proposing anything. He set our expectations of what the next steps would be and has delivered on them 100%. Mark is very easy to talk to and has given confidence this will be a long term relationship.

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Review from Verified Client

Gloucestershire | October 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark has advised me on pension and investments and explained every thing in a very easy to understand way. The service I received was excellent and I shall be using him for all on going work and would have no hesitation in recommending him.

Review from Verified Client

Gloucestershire | October 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Excellent explanation of the policy and our options for our future. Very friendly and professional, made us feel very comfortable.

**What could they have done better?**

Nothing, he was excellent round, even visiting out of hours to see us.

Review from Verified Client

Gloucestershire | August 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

While I have only been with Mark for a short time to date I have found his advice and explanations of the various options available to be very clear and helpful, and I have every confidence that the investments that he has recommended will be beneficial.

Review from Verified Client

Worcestershire | May 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Mark certainly knows his stuff and he is our trusted adviser on financial matters - we've used Mark for a number of years - I would very much recommend him

#### What could they have done better?

Nothing that springs to mind

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Review from Verified Client

Gloucestershire | May 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

He provided impartial advice in a very clear and understandable format. When he felt he would struggle to get better terms for one of my pension funds he was very happy to tell me so . Very friendly service and was happy to arrange evening meetings at my home which helped with my work schedule.Understood completely my attitude to risk.

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Review from Verified Client

Herefordshire | May 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

My adviser took time to evaluate my financial situation and my attitude and willingness or not to take risk. Clear information regarding all available products was made available to me in a professional manner. I felt confident that I had purchased a product that suited my current financial situation. My advisers costs were inline with other in this market.

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Review from Verified Client

Lancashire | March 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark is a friendly and open person who immediately instills confidence and makes you feel relaxed. I found him to be highly skilled at explaining matters to me in a non-patronising way, but at the same time in a way that I understood. Throughout my consultation with him he was keen to check regularly that I was understanding the information he gave me so that I felt involved in the whole process. Mark turned what could be an anxious or worrying matter into a far more pleasant one and I left wishing I had consulted him a long time ago..

#### What could they have done better?

I honestly cannot think of anything!!

---

Review from Verified Client

Gloucestershire | February 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark was responsive to my enquiry and his analysis of my financial situation and recommendations were robust

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Review from Verified Client  
Gloucestershire | January 2014  
★★★★★ 4.7 out of 5

.947a1.5,1.5,0,0,1,-491,1.4871-2.348,9.1a1.447,1.447,0,0,0,2.172,1.59317.813-5.062a1.362,1.362,0,0,1,1.541,017.848,5.062a1.447,1.447,0,0,0,2.172-1.5931-2.348-9.062A1.462,1.462,0,0,1,225.52,19.761Z" transform="translate(-199.939 0)" fill="#4BC1CA" />

Advice: ★★★★★  
Service: ★★★★★  
Value: ★★★★★

Mark very quickly grasped our situation and our attitude to risk, helping us to create a portfolio to match our needs/goals. He is always approachable, explains things clearly and is friendly and professional.

#### What could they have done better?

We are completely satisfied with Mark's role in our life. The only thing might be to avoid duplication and use less paper (both of us get a copy of everything)!

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Review from Verified Client

Gloucestershire | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We only used Mark for sorting out my pensions but I can honestly say his service was superb. My pension wasn't huge so his charge wasn't big yet he treated us as if he was earning thousands of pounds from the transaction. He was straightforward in his explanation of things and extremely patient with us when we didn't quite understand things. I have no hesitation in recommending Mark to anyone. Ian Creese

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Review from Verified Client

Dorset | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark is very professional in both his dealings with me as a person and with my investments. He fully understood what products I wanted and was adaptable to any suggestions I made. I would HIGHLY recommend.

---

Review from Verified Client

Wiltshire | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark has always provided a personal approach in advising us on many areas of financial planning. Quick responses to all queries and has formed a relationship with us built on trust which for us is very important. Would recommend this company for all aspects of financial planning.

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Review from Verified Client

Gloucestershire | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark is an excellent advisor in all aspects that he has provided advice to us, he always keeps you totally informed of every stage and you never has to chase him up, I would totally trust mark with all of my financial affairs.He has provided an excellent portfolio in the case of our pension planning and the funds are really performing well.

**What could they have done better?**

I don't think there is anything that mark does not do well, I would have no problem recommending his services to any one, most people whu have used him would confirm this.

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Review from Verified Client

Wiltshire | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I would highly recommend Mark Manning as a Financial Adviser in all aspects. He is an expert in his field and he provides a very professional service with no 'hard sell'. He has enabled myself and my close family to make choices in short and long term financial planning by providing up to date knowledge of the services and products currently available. In addition he has made what can be a complicated subject a lot easier to understand. He is approachable, professional, honest and genuine - and if he say's he will get back to you by a certain day and time he does!

**What could they have done better?**

I can honestly say I can not think of any constructive suggestions at this time.

---

Review from Verified Client

Gloucestershire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

From first hand experience, Mark takes time to understand the individual needs of his clients. We found this so reassuring and quickly realised that a selection of financial products, that satisfied our requirements, would be presented to us; with all of our questions answered clearly. In contrast to today's world of targets and hard selling tactics; it is such a pleasure to seek Mark's advice on financial matters; which he provides in a calm, reassuring and thoughtful manner. At the end of each meeting with Mark, we always leave feeling we have made balanced and informed decisions thanks to his diligence and professionalism.

#### What could they have done better?

This service works very well; just as it is. Mark's approach is grounded in traditional face to face discussions, honesty and integrity. What could be better?

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Review from Verified Client

Cornwall | October 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

My wife and I have known Mark professionally for many years. We have found that he always provides quality, impartial and extensively researched advice concerning a wide range of financial matters. Mark is always readily available, whether by 'phone, e-mail or in person, to any requests for information or data. He has great integrity and is always highly professional in all of his dealings. He has provided sound, reliable and profitable advice during extremely challenging world wide trading conditions and we have no hesitation in recommending him.

#### What could they have done better?

At the present time, there are no matters that we could suggest that Mark could improve upon.

Review from Verified Client

Gloucestershire | October 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark has been looking after our finances for many years. His advice and the options given are always well researched and explained in a very understandable way.

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Review from Verified Client

Somerset | October 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark has been my financial advisor for many years (10+). I stuck with him when left one company to start up on his own. I did this because he has always been very clear and honest in our dealings and left me entirely confident that I was getting good impartial advice. Occasionally I have had to contact him about financial concerns and have always received a prompt reply giving an expansive and informative reply. Mark always reminds me when an annual review is due and always comes to my home at a time and date we arrange. All very convenient! Mark is very clear and patient in answering questions during our meeting and frankly, he very well understands what my financial needs and concerns are and what I want to know. There is no sales flannel. Just clarity and unhurried attention to giving me the advice I want supported by written confirmation. A final point is that Mark has given me the same time and high quality service even when I had relatively little money to invest. I look forward to continuing our effective business relationship and would be more than happy to recommend him to others.

#### **What could they have done better?**

I have no issues with the service I receive. I am entirely confident that any concerns I have are swiftly and satisfactorily addressed.

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