

LINDSEY ADAMS

Background report to support
inclusion in the **2019 Guide To The
UK's Top Rated Financial Advisers**



Lindsey Adams

Quadrant Financial Associates Limited

 Top Rated 2019

4.8 / 5  50 reviews

VouchedFor checks:

 FCA Regulated








 Recent Client Reviews

 Independent Financial Adviser

 Qualifications Uploaded

 Positive First Impressions

Services offered

-  Pensions
-  Retirement income (annuities, drawdown)
-  Auto Enrolment
-  Investments and Savings
-  Occupational Pension Transfers
-  Inheritance Planning
-  Long Term Care

Qualifications listed

Advanced Qualifications: 2 Qualifications

CII - Chartered Financial Planner

CII - Advanced Diploma in Financial Planning

Standard Qualifications: 8 Qualifications

PFS - Member by Diploma

CII - Mortgage Advice Qualification

CII - Diploma in Financial Planning

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

Client Reviews

Lindsey Adams

Quadrant Financial Associates Limited



4.8 out of 5

Review from Verified Client

Rhondda Cynon Taff | February 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement

How did Lindsey help you?

Explaining a complicated subject in a simpler language for me to understand.

Have you seen the outcome you were hoping for?

Yes, and has saved me money in the long run.

Review from Verified Client

Rhondda Cynon Taff | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was in a difficult financial situation and needed help releasing money from a pension fund.

How did Lindsey help you?

She went through all the available options and helped me do what was right for my situation.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Rhondda Cynon Taff | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

On retirement after 40yewrs with the same firm I needed advice with retirement severance and savings and I realised that I needed professional help.

How did Lindsey help you?

Spent time with myself and my wife and helped us to decide both short term and long term planning and she made us feel comfortable and she explained everything clearly..

Have you seen the outcome you were hoping for?

Yes the advice received has been very successful

What could they have done better?

Not sure that the service and advice could be any better

Review from Verified Client

Vale of Glamorgan | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

British Airways closed my Final Salary Pension scheme and I wanted to know my options.

How did Lindsey help you?

Advised me of the best options for me With my BA closed pension given my current circumstances and she pooled together 3 paid up personal pensions and a FSAVC and they are now re-invested and working for me rather than just sitting there doing very little.

Have you seen the outcome you were hoping for?

Yes. Absolutely.

What could they have done better?

Nothing. Everything was top notch. Thank you Lyndsey.

Review from Verified Client

Rhondda Cynon Taff | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension review

How did Lindsey help you?

Covered all my pension questions was extremely helpful and clear

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing Lindsey covered everything I needed to know

Review from Verified Client

Neath Port Talbot | April 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension transfer.

How did Lindsey help you?

Explained thoroughly and concisely implications of transferring pension.

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

Bit early to say as only transferred pension a few weeks ago but have total confidence in Lindsey's advice.

What could they have done better?

Nothing

Review from Verified Client

Monmouthshire | April 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 my pension to another provider.

How did Lindsey help you?

Lindsey was great , she took her time explaining all the options and gave impartial advice but more importantly gave me the confidence I was looking for in what was a very stressful time. Lindsey's knowledge of the pension business gave me great comfort in knowing I was dealing with the right person.

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

Yes , the transition was seamless and I am now in a far more , what I consider , better financial position.

What could they have done better?

I think Lindsey's could not have done more her professional approach and calming influence coupled with her extensive knowledge , has been excellent.

Review from Verified Client

Neath Port Talbot | April 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Work pension.

How did Lindsey help you?

Lindsey helped me by setting up my pension.

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

Yes.

What could they have done better?

Done everything very well and I was pleased with service

Review from Verified Client

Bridgend | March 2018

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

closure of british steel pension scheme.

How did Lindsey help you?

advice about private pension schemes.

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

yes , transferred out of the BS pension scheme.

What could they have done better?

no

Review from Verified Client

Neath Port Talbot | March 2018

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

DB transfer to Private Pension.

How did Lindsey help you?

Providing good honest advice wrt my transfer and where to Invest etc.

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

Initially the results are looking good but only time will tell.

Review from Verified Client

Newport | January 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Closure of my Works Pension, and changes to the proposed new scheme with greatly reduced benefits, and adding unwanted extra years to my retirement plans, along with uncertainty of any further changes in the future, which could further erode my Occupational Pension entitlement & benefits.

How did Lindsey help you?

Brilliantly ! A lot of time & effort was spent with me going through all my options for a pension transfer into a private pension. All pros & cons were discussed at great length, and all options open to me were explored. A detailed report based on my risk profile was undertaken to ensure that the private pension I selected suited my future retirement plans & matched my attitude to risk & growth. I was kept informed with progress during every step during the transfer process to my new provider.

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

Yes, I am extremely happy with the outcome reached, and would thoroughly recommend Lindsey to anybody (I have already done so with many colleagues).

Review from Verified Client

Bridgend | January 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Closure of my present pension scheme With British Steel.

How did Lindsey help you?

With her advice I have withdrawn my funds from British Steel and she has set up and invested these funds with the Prudential.

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

My future is now under my control.

What could they have done better?

Nothing. She has always been most helpful and explained all the steps in great detail.

Review from Verified Client

Neath Port Talbot | November 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension transfer.

How did Lindsey help you?

Lindsey was very welcoming putting us at ease straight away. She is very professional in guiding us through our pension transfer step by step. Lindsey has answered any questions we have asked and covered points we hadn't thought of. She has taken the time to make sure that the voices we are making were the right ones for ourselves. Lindsey is readily available for any concerns we have.

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

Lindsey has produced high quality documents for us and we are confident that once everything is finalised the outcome will be favourable.

What could they have done better?

Everything has been done to our satisfaction. Lindsey and her colleague Clare have always been available, communication is excellent.

Review from Verified Client

Blaenau Gwent | November 2017

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking to transfer a company pension to a private pension.

How did Lindsey help you?

Lindsey was very helpful in guiding me through the process of my transfer, explaining all the necessary steps in a clear and simple manner. Though I've not yet had advice on my ongoing financial situation I'm sure when the time comes she will provide a professional, helpful service.

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

To date I have had no issues with Lindsey's service, I'm sure going forward will be the same.

What could they have done better?

Nothing to date

Review from Verified Client

Swansea | November 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension Pot Transfer.

How did Lindsey help you?

A first class service from Lindsey from the outset. Initial 1-2-1 interview was very informative, and non-pushy, unlike some of the other FA's that i'd met.

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

The recommendations were clear, and very detailed to my personal needs. Documents produced where to a very high standard. Based on the advice given, the option provided by Lindsey will allow me to retire far earlier than other choices that were open to me.

Review from Verified Client

Neath Port Talbot | November 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Moving my pension.

How did Lindsey help you?

Lindsey initially advised me then transferred my pension.

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

Yes.

What could they have done better?

Nothing. Lindsay is doing a fantastic job.

Review from Verified Client

Swansea | November 2017

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Transferring my pension.

How did Lindsey help you?

Give me advice on pensions.

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

Long term investment so will see the outcome over the next 10 years.

What could they have done better?

Could possibly be mobile, some advisers come to you. Improve parking at Taffs Wells.

Review from Verified Client

Neath Port Talbot | November 2017

★★★★☆ 3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

A better than expected pension pot that I wanted to access.

How did Lindsey help you?

In the options available to me, pro's and con's.

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

Yes.

What could they have done better?

I felt very comfortable with her advice and professional services.

Review from Verified Client

Neath Port Talbot | November 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Enforced pension changes through my current employer.

How did Lindsey help you?

Lindsey explained all the options available to myself and the situation I found myself in. She was totally honest about the financial implications in all options I could pursue.

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

Yes. She has put my mind at ease.

What could they have done better?

To be totally honest, Lindsey was very good in all that she done for me and my situation. Where other IFA's were promising pots of gold, she seemed to spell out more realistic future incomes.

Review from Verified Client

Blaenau Gwent | November 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking for advice on weather to draw out my pension from my employers scheme

when it was announced it was to close.

How did Lindsey help you?

After Lindsey listen to my plans for the future, she explained to me my options going over them until I fully understood the process and the possible benefits, but also the pit falls that could arise and the way that these could be minimised. Lindsey showed great patience in explaining everything and outlining my options and explaining them in a way that I could understand, and making me feel at ease.

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

As a result of the meetings and the documents and recommendations I feel happy with the advice I received. The changes I have now made based on the advice from Lindsey means I feel more in control of my finances, this is because the choice of products on offer enabled me with the advice to choose and make arrangements for my pension. As a result of the advice from Lindsey, in the event of my death before my wife she will now be much better provided for.

What could they have done better?

I cannot think of anything Lindsey could have done better, she should patience throughout our meetings, and explained everything in a way that left no detail out but was simple enough to understand.

Review from Verified Client

Vale of Glamorgan | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Trust fund for our granddaughter wanted the trust fund to be safe and secure and needed secure and trust worthy financial adviser and found that lindsey was that person.

How did Lindsey help you?

By growing our grand daughters wealth from the age of 7years. To 21 years of age. She made secure and safe profits , and has made our grand daughter quite a healthy return , with out us having to worry.

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

Much more than we expected. Very pleased as we were in a very difficult situation.

What could they have done better?

There is nothing better for us 100% attention at all times and always returned phone call s promptly you always felt that you were very important To her and that you always came first

Review from Verified Client

Sussex | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Critical illness cover following a review, by Lindsey, of my overall situation.

How did Lindsey help you?

Lindsey did everything - I only had to sign on the dotted line after choosing one of different options submitted by Lindsey.

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

Absolutely.

What could they have done better?

Nothing - Lindsey had everything covered as always.

Review from Verified Client

Cardiff | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Coming up to retirement.

How did Lindsey help you?

Lindsey was very helpful and explained every thing I need to known in away I understood.Gave me advise for the best out come for my pension.

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

Very happy with the advise given about my pension, and documents are easy to understand.

What could they have done better?

Nothing everything was done in a very professional and friendly manner.

Review from Verified Client

Vale of Glamorgan | February 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Needed advice on current pension arrangements and a review of existing life cover.

How did Lindsey help you?

Pensions all reviewed and actioned. Existing life cover also reviewed.

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

Yes and helpful that there is flexibility with appointment times.

What could they have done better?

Happy with current service

Review from Verified Client

Cardiff | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement.

How did Lindsey help you?

She set up an annuity and provided valuable professional advice about an endowment policy, our pensions, savings, investments and other financial matters, and guidance about current and anticipated government policies and financial trends.

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

Since retiring in 2008, I have been consistently waiting for higher interest rates on my savings-mostly fixed rate bonds-, but feel that I have found the best rates available at the

time. I doubt that I could have started an annuity on my own.

Review from Verified Client

Vale of Glamorgan | February 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★

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

Transfer of a pension.

How did Lindsey help you?

Good advice that was easy to understand. Explained the pros and construction and gave me time to consider the information without pressure to proceed.

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

I have just received confirmation that the pension has been transferred and Lindsey will be keeping in contact.

Review from Verified Client

Hampshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Divorce.

How did Lindsey help you?

My ex-husband dealt with all the financial matters so when I divorced I needed someone who was understanding of my circumstances and needed someone I could trust and feel comfortable with. Lindsey ticks all the boxes.

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

Yes I have.

What could they have done better?

Lindsey as always been approachable and at the end of the phone if I have any queries and

quick to respond. Therefore, no changes required.

Review from Verified Client

Suffolk | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Following a divorce I needed assistance in investing my finances as a single person, looking ahead to the future.

How did Lindsey help you?

Lindsey listened to my concerns and aspirations carefully and gave me good advice.

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

Yes, I have. In fact although I have moved to the other side of the country I will continue to consult Lindsey.

Review from Verified Client

Caerphilly | December 2016

★★★★★ 5 out of 5

Value: ★★★★★

Advice: ★★★★★

Service: ★★★★★

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

i wanted to release some money from my pension , and i wanted sound honest advice.

How did Lindsey help you?

lindsey , explained evrything in plain english was very helpfull and could not do enough for us.

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

early days yet but evrything looks very positive.

What could they have done better?

lindsey answered any questions we asked in plain english i found her very professional I was very glad we spoke to lindsey

Review from Verified Client

Caerphilly | December 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension transfer.

How did Lindsey help you?

Lindsey explained everything in great detail with us.

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

We are awaiting our results.

What could they have done better?

Nothing really she was very helpful

Review from Verified Client

Vale of Glamorgan | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We wanted to make our money work better for us.

How did Lindsey help you?

Gave good sound advice in a friendly and professional manner.

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

Yes.

What could they have done better?

I am happy with the service provided and will continue to her expertize

Review from Verified Client

Monmouthshire | November 2016

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Planning for retirement after selling own business.

How did Lindsey help you?

Suggested suitable investments to provide income during retirement.

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

Yes, as far as is possible in present markets.

What could they have done better?

More explanation of our investment companies

Review from Verified Client

Monmouthshire | October 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement sum and income from Sale of property.

How did Lindsey help you?

with investment advice.

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

yes.

What could they have done better?

very little considering the financial climate over the past 8 years

Review from Verified Client

Gloucestershire | October 2016

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We had a number of pension funds and wanted to consolidate and optimise our portfolio.

How did Lindsey help you?

By resolving our problems above.

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

Yes.

Review from Verified Client

| October 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement is beginning to loom on my distant horizon and I felt I wanted to understand what options I may (or may not !) have.

How did Lindsey help you?

Lindsey sought information before our meeting to best understand my potential position and was able to speak meaningfully about any aspirations I had.

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

Lindsey gave good steer and indeed outlined several options that I had not considered.

What could they have done better?

Difficult to say. Lindsey was recommended to me by our tax advisor and she clearly knows her subject.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was advised to use Lindsey when my mother died and I needed advice on investing my inheritance. Since then she has provided financial advice to both my husband and me as well as friends and family.

How did Lindsey help you?

She initially carried out a full assessment and review of our finances before recommending investment products. She carries out regular reviews during the year so that investments can be altered when necessary. She has also advised my husband on his complicated pension arrangements!

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

Yes. We have complete confidence in Lindsey's advice.

What could they have done better?

I honestly cannot think of anything that Lindsey could improve. She is always professional and efficient but manages to explain complex matters in a way that the 'layman' can understand.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: dth: 15px; height: 15px"

src="https://assets.vouchedfor.co.uk/img/rating-star-full.jpg"

/> ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I required advice on investing.

How did Lindsey help you?

Lindsey came to the house to meet and discuss options suitable for me.

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

Yes, my investments have been monitored and safe guarded in a changing market.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Investment advice.

How did Lindsey help you?

Offered personal, professional advice.

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

Yes.

Review from Verified Client

| September 2016

★★★★★ 4.7 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★☆

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

Needed to access pension fund and was not allowed to do it without financial advice.

How did Lindsey help you?

was the only financial advisor we contacted that really understood our position and was prepared to do for us what we wanted to do.

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

Yes.

What could they have done better?

nothing really I don't think the service we had could have been improved.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Following retirement had the need to invest capital well with good returns, while not taking high risks.

How did Lindsey help you?

Lindsey gave us sound advice and we were able to determine a balanced portfolio and some sound investment on ISA's and others products in companies that have proved to have good returns.

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

Recommendations have been sound and in our best interests while not pushing you into areas you do not wish to go.

What could they have done better?

Lindsey has a very easy helpful style and will take time to explain without using jargon. Should ensure that understanding is there.

Review from Verified Client

| September 2016

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To make sure I'm using my finances in the most cost effective way.

How did Lindsey help you?

Reviewed my current portfolio.

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

Yes.

What could they have done better?

None

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Seeking a good return on savings and using ISA allowances.

How did Lindsey help you?

Lindsey continues to advise on my investments and using any annual ISA allowances.

Lindsey also reviews my investments and recommends redistribution to suit the current economic environment.cc.

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

Completely satisfied that Lindsey obtains the best possible return with very little risk.

Review from Verified Client

| September 2016

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retired and needed good advice with savings and lump sum from firm and long term plan.

How did Lindsey help you?

With very good advice and I decides what risk I wanted.

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

Yes very pleased.

What could they have done better?

I was supplied with very sound advice and final decisions were left to my self and family where necessary

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wanted professional help.

How did Lindsey help you?

Good advice.

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

Yes in the past.

What could they have done better?

She has done all she can
