

# Simon's Review

The idea of consulting a financial adviser had never crossed my mind and always seemed like something that rich people or businesses do, not for someone like me, a first-time buyer. However, my fiancé and I were recommended Simon when looking to buy our first house and from the first correspondence Simon was been very friendly, clear, meticulous and readily

available – all key ingredients when someone is working with your money.

Simon dealt with our mortgage for our first house and walked us through each step clearly and concisely. Simon travelled all the way from Bristol to Birmingham on numerous occasions to help us out by explaining any processes, forms, fees, give general advice and sort out any queries we had - every time with patience.

Both my partner and I have busy lives, so having Simon liaise with solicitors, mortgage companies, estate agents, etc. alleviated a lot of pressure by taking it all off our hands and saved us an unbelievable amount of time. Simon was always available on the phone and/or by email, whichever was our preference for that day or week, making the whole procedure run smoothly.

We've both had bad news recently with family illnesses and such, so we decided to take out life assurance and critical care insurance, which meant that we didn't end up paying Simon (directly) for his services! Furthermore, at no point did we feel pressured to take out extra services or products that we didn't need, want or ask for.

Simon was extremely dedicated and surpassed all our expectations, and, more importantly, we always felt like we were his main priority. In fact, we were so impressed that we have decided to work with Simon in future money saving/making ventures.