

Roll of Honour

2012 - Winner Pensions IFA of the Year*
2012 - Runner Up IFA Firm of the Year*
2012 - Runner Up Online IFA of the Year*
2011 - Winner Online IFA of the Year*
2011 - Runner Up IFA Firm of the Year*
2010 - Winner IFA Firm of the Year*
2010 - Winner Online IFA of the Year*
2009 - Best Tax and Estate Planner Award
2009 - Runner Up IFA Firm of the Year*
2008 - Winner IFA Firm of the Year*
2008 - Runner Up Online IFA of the Year*
2008 - Best Financial Education Initiative Award
2008 - Best Online IFA Award
2007 - Best Financial Advice Site Award
2007 - Best Online IFA Award
2007 - Best Online Regulatory Initiative Award
2006 - Winner Online IFA of the Year*
2006 - Winner Pensions IFA of the Year*
2006 - Runner Up Protection IFA of the Year*
2005 - Winner Online IFA of the Year*
2005 - Winner Critical Illness IFA of the Year*
2004 - Winner Online IFA of the Year*
2003 - Best Use of the Web Award
2003 - Runner Up IFA Firm of the Year*
2003 - Runner Up Protection IFA of the Year*
2003 - Best IFA Website*
2002 - Winner IFA Firm of the Year*
2002 - Best Use of New Media Award
2002 - Best IFA Website*

**Financial Times Business Financial Adviser Life and Pensions Awards*

Administration Centre & Head Office: Need An Adviser, Prosperity House, Water Street, Burntwood, Staffordshire WS7 1AN. Tel: **+44 (0)1543 677444**

London & South East: Need An Adviser, Gainsborough House, 2 Sheen Road, Richmond, Surrey TW9 1AE. Tel: **+44 (0)20 8144 7620**

Email: info@financialadvice.net Web: www.financialadvice.net

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The Things People Say

Roberts Clark's FinancialAdvice.net

United Kingdom & International
Wealth Management



*A selection of comments
from Clients and Industry Awards*

Midlands 01543 677444

"Trying to make major financial decisions is intimidating and I was quite anxious about it. When I met Ashley I was surprised at the length and thoroughness of the consultation process and impressed by the advice I received. I suspect few financial advisers would tell you not to do something because it was not in your best interests, especially if it meant they lost a potential fee. I felt that he was genuinely concerned for my financial welfare, not just company profits. We discussed several options, most of which I was unaware of. As soon as the work began, I received regular updates via email which meant that I was always aware of how matters were progressing. An entirely satisfactory experience!" **Rose, Chiswick.**

"We would like to thank Ashley, Joanne and their excellent support team for all their hard work in sorting out our pensions and endowments. They are extremely professional, dealing with matters on a timely basis and have kept us informed at every stage of proceedings. They go that extra mile to ensure that all aspects of our financial affairs are all in order, giving us peace of mind. Thank you all." **R.A.H. and M.E.H. Staffordshire.**

"We have been with Need An Adviser since 2008. We have found that over the years that both Ashley and Joanne have always offered us a professional and courteous service. Their advice under these difficult times has always been in our best interest, and they are quick to inform us if they feel that the markets are fluctuating for us to take action to safeguard our investments. The office staff are always willing to help, and if they cannot help they get the information we need as soon as possible. We live in Spain and as our financial experience is limited we have been more than happy to put our trust in Ashley, Joanne and their team, and would highly recommend them." **Graham and Mel, Spain.**

"The whole team is very professional, yet friendly enough to make you feel at ease and importantly to us come across honest and trustworthy in the advice that you give. Very good at communicating and keeping us updated on the progress of our pensions and with your newsletters/emails etc also. Would highly recommend." **Sarah and Rich, Staffordshire.**

"Great service. I was particularly impressed by the openness and simplicity of the charging system and the information I received at every point in the process. Very successful outcome, both my wife and I are very satisfied with the service we received. Thank you." **P.Y. Oxford.**

"I was one of your first clients when you were first starting out. You have helped with my financial matters through the years with professionalism coupled with a personal attention which was second to none." **Rosalyn, Sutton Coldfield.**

"I asked Joanne for advice three years before I retired as I was being given lots of advice but no real information from my pension schemes. Joanne looked after my pensions during this time and gave extremely valuable advice about what to leave and what to move during this turbulent period. As a result I was able to retire with an excellent pension, all arranged by Joanne, from the best provider. The money I saved doing this more than paid for the service given. Joanne, Ashley and their staff are friendly and approachable at any time. I can't recommend them highly enough to anyone needing independent financial advice." **S.A. Burntwood**

"I found Need An Adviser very professional, efficient and easy to deal with. They said what they were able to do, provided the options and the costs and once I had made the selection they did what they said they would do in the agreed timeframe. I must admit to being pleasantly surprised." **Carl, Bermuda.**

"Many (so called) financial advisers are just out for themselves, these guys will tell it as it is and honestly do what is best for YOU." **Dave Moreton, Lichfield.**

020 8144 7620 London

"Just to say "Thank you" to Ashley and Joanne for the advice they gave regarding our investments. We lost money on investments recommended by previous financial advisers but we are very pleased with returns on investments advised by them since 2009. There is a fee for the annual M.O.T to consider but so far this fee has been very worthwhile." **Michael and Maureen, Potters Bar.**

"Ashley and Joanne have always been very responsive to all of our queries, and have always understood the specific nature of our situation vs. others. They know the details of what we need, and their knowledge of us as people is very impressive." **Alan and Julia, Richmond.**

"Jo and Ashley gave all our finances; pensions, life cover, endowment policies and wills a complete overhaul last summer and it was an invaluable service. Our pensions are now up-to-date in policies which no longer pay inflated fees out each month and I feel relieved that everything is now on track for the future. They are both very open and approachable and you can ask them anything and not feel stupid - which is how I usually feel when it comes to anything financial. They are a pleasure to work with." **Joanne Kennedy, Thames Ditton.**

"I have always found Joanne and her support staff very efficient in dealing with our affairs. I find her advice considered and of good quality with their monthly report and feedback on markets together with the alert facility they offer very useful." **J.S., Derbyshire.**

"The services provided are excellent. When asking for advice, replies have been quick. Many thanks for your help." **Marian, Richmond.**

"I have used needanadviser.com for advice on both pensions and mortgage options. I have always found needanadviser.com to be very thorough, knowledgeable and more importantly, full of integrity. Their advice has been accurate and also pragmatic with options provided to suit to our specific aims and situations. They have always been pleasant and approachable to deal with and responded in line with the expectations set. I have already recommended their services to friends and relatives and would have no reservations about using or recommending them again." **Simon Persin, Hampshire.**

"I trust Joanne and Ashley with my pensions and life savings. They stopped hidden commissions set up by my previous adviser, they got me the best deals and I now have more than enough money for the rest of my life. I do not think there can be a greater endorsement of trust and faith in two of the hardest working people I have ever met and I have lived all over the World and met many so called advisers." **Andrew, Molesey.**

"Ashley and Joanne in my experience over a number of years provide an excellent and thorough service. They take time to understand your personal situation and objectives, and come back with well researched and clear recommendations. I have always particularly appreciated the open and straightforward way in which both of them work. The follow up service and regular bulletins provide an excellent facility for clients to keep abreast of market and legislative changes. I would recommend them without hesitation." **E.J.H., Northwood, Middlesex.**

"The advice I have received makes and hopefully continues to keep my investments ahead of the crowd. No matter who you talk to, all the staff are pleasant, courteous and knowledgeable. Both Ashley and Joanne show a clear understanding of their clients' needs and aspirations. Therefore, I would recommend Need An Adviser to anyone who is after sound, independent, financial advice." **G.B. Burntwood.**

We have many more examples like this, if you would like to email or talk with our clients.