

## Client Reviews

**Ian Green**

Green Financial Advice Limited



4.9 out of 5

Review from Verified Client

London | June 2018

★★★★★ 5 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★

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

Financial and retirement planning.

**How did Ian help you?**

After initial sessions to identify our current financial position and goals, Ian helped us simplify our investments and pension arrangements. He explains matters in an accessible way and identifies a tax efficient approach. He and his small team monitor the market and make regular recommendations for rebalancing to meet our risk appetite, at no additional cost. The online tool allows you to monitor your investments quickly and easily. Ian's approach is transparent so you see returns before and after costs.

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

Yes. I have a clear view and understanding of our financial position and feel I can continue to plan our future and retirement options with Ian's expert support. Choosing Green Financial Advice a few years ago was one of the best financial decisions I've made!.

**What could they have done better?**

I can't think of any. I'm very happy with the service.

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Review from Verified Client

Surrey | March 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had some money to invest and wanted to make sure it would be working for me.

**How did Ian help you?**

He gave in-depth personalised advice.

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

Yes.

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Review from Verified Client

London | December 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to get some advice on financial planning, including my pensions, investments and mortgage.

**How did Ian help you?**

A lot of people are cynical about IFAs - they should meet Ian Green. I contacted him

for financial planning advice and he immediately told me that it would not be good value for me to spend money with him when there were some basic steps I could take myself for the desired outcomes. He then spent 30 minutes of his time talking me through his recommendations for my finances and answering all of my questions. He was friendly, helpful, patient and incredibly honest. I would recommend him to anyone and hope to work with him in the future.

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

I've already implemented some of the advice Ian gave me and he also recommended a local accountant who could help me further.

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Review from Verified Client

London | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Early stage assessment of financial strategy.

**How did Ian help you?**

A phone call to discuss my options during which I set out my background, Ian asked me a number of questions about my circumstances and goals, and then provided me with some sensible options to consider.

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

Yes, this was an initial view, rather than a full consultation. I was not charged for this so consider it excellent value and sound advice. At this stage it did not involve much by way of recommended products but was really about direction. I will go back to Ian for some more indepth advice, in about 12 months time.

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Review from Verified Client

London | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to consolidate various existing investment vehicles and pensions in a single place to simplify management and get general financial advice such as retirement planning.

**How did Ian help you?**

Ian efficiently navigated all the paperwork and existing providers to place everything on a single management platform that I can view online. He has provided excellent advice when needed and I've found him approachable and straight talking which I very much appreciate.

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

I am very satisfied with the current situation, where I am now able to manage everything through a single person and the performance has been strong through turbulent markets.

**What could they have done better?**

I have yet to find anything yet - but he knows I will let him know if I do :).

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Review from Verified Client

London | January 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted help setting up a new pension and consolidating others, moving a small investment fund and updating life insurance.

**How did Ian help you?**

we had an in depth conversation about my assets and what I might do with them. Ian explained that given the amount of capital we have so far it would be expensive to engage his services at this stage and as I have a good knowledge it is possible to go ahead on my own. I was impressed that he took the time to talk through my situation and give advice and at the end of it say you dont need my services!.

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

Ian gave me the confidence to go down the DIY route for my present situation and in a few years hopefully when my pot has increased I will go back to him.

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Review from Verified Client

London | December 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Scattered investment consolidation and planning for retirement.

**How did Ian help you?**

He simplified my investment portfolio and gave super advice on future income needs.

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

Yes. His guidance has provided steady and good returns in a volatile market. And I've had practical and well presented guidance on retirement planning enabling me

to better plan my career decisions from now on.

**What could they have done better?**

Nothing material - maybe a bit faster on the life/health assurance review but that is very secondary to my primarily objectives of investment and retirement planning.

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Review from Verified Client

Surrey | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My finances were spread in lots of places and hard to keep on top of.

**How did Ian help you?**

Ian is responsive, honest and on top of the investments which is all I want from my advisor.

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

yes so far so good.

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Review from Verified Client

London | November 2016

★★★★★ 5 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★

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

Looking for some pension advice.

**How did Ian help you?**

He talked through the services he offered, reviewed my situation, listened to my concerns and current knowledge of the pensions landscape . Unlike other advisors I have spoken to I did not feel that he was trying to sell me something I didn't want, and I felt he gave me some commonsense suggestions based on what I'd asked him about and in line with my current financial situation. His knowledge of ethical investments was particularly important for me.

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

Talking through my situation with Ian helped clear my mind a bit and has made me feel more able to make a decision to meet my immediate needs. I know that in the future, should I need more in depth financial services, Ian is someone I will be getting in touch with.

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Review from Verified Client

London | July 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

A small inheritance and concern about poor management of the money.

**How did Ian help you?**

We didn't get beyond an exchange of a few emails as he suggested I wait until my circumstances become clearer with a steady income. I appreciated his honesty and integrity in advising me NOT to use him until circumstances change.

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

I had hoped he would help me with my money but he helped me understand that it wasn't the right time for me yet. I thought that was honest and straightforward of

him and appreciated that; I would go back to him if I could.

**What could they have done better?**

He could make it clearer on his website that he may offer the initial consultation for free, as it wasn't obvious and I would have discounted him as his competitors make it clear that they offer the first consultation for free. The only reason I did contact him was because I found him on a website listing ethical IFAs; again that's something he could make more of on his website to attract clients like me.

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Review from Verified Client

Wiltshire | July 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Redundancy - investigating severance.

**How did Ian help you?**

Gave free advice over phone.

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

Ian reaffirmed my thoughts on how best to invest.

**What could they have done better?**

Nothing in this case.

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Review from Verified Client

Hampshire | May 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

A small legacy plus dissatisfaction with my previous adviser.

**How did Ian help you?**

By being completely straightforward. I was working at the time and Payment Protection and Critical Illness plus safe investment options were important.

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

yes. Over the years my situation has changed and Ian Green has reflected these changes in the advice and products he has recommended for me.

**What could they have done better?**

Before I had to cancel my Life Insurance Policy which I could not have afforded now that I am retired, I would have appreciated him suggesting that the premiums were paid from a different source within my portfolio. This has resulted in me wasting funds.

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Review from Verified Client

London | April 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pensions advice in relation to Lifetime allowance and protection.

**How did Ian help you?**

Hugely helpful. Explained what I needed to know without baffling me with complexities. Listened to what I was saying. Left me with a clear and helpful course of action. What more could I ask for?!

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

Yes most definitely.

**What could they have done better?**

To be honest nothing. Top stuff

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Review from Verified Client

London | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were looking for pensions advice.

**How did Ian help you?**

We were nervous about talking to a financial advisor, but felt we needed some advice on pensions. Mr Green is very approachable and there is no pressure or hard sell from him. He gave us straightforward, easy to understand advice.

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

Yes.

**What could they have done better?**

No. We were pleased with the result

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Review from Verified Client

Surrey | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Ian Green was recommended to me some 15 years ago now and I moved to him in 2001.

### **How did Ian help you?**

He devised a financial strategy based upon my attitude to risk etc and helped build a portfolio that would help cater to my current needs at that time, and also with my future requirements at retirement 10 years hence. I must add that writing this having now retired, my portfolio and retirement income has improved markedly under Ian Green's guidance to that that was advised by my previous financial advisor! Ian covers all aspects I required extremely well, mainly investment, tax and estate planning whilst maintaining an important degree of flexibility. I have found him to be extremely knowledgeable, always taking whatever time is necessary to explain procedures to me, and with the not often found ability to explain things in simple English. He is always approachable and with a small friendly team behind him headed up by the excellent Melissa I could not ask for much more. I am able to monitor most investments securely and easily online which I find quite useful.

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

The outcome has generally been rather better than originally hoped for. He offers an excellent service and his charges are more than reasonable for the work and advice received.

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

There is nothing that I can think of that could have been done better, I am extremely pleased with all aspects of his service. I am very grateful that Ian Green was recommended to me and I would certainly recommend him to others, and

have already done so.

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Review from Verified Client

London | January 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wishing to start a personal pension and needing advice about all aspects of personal pensions.

**How did Ian help you?**

Ian Green advised about the best pension for me and subsequently helped me improve my pension. It was clear that Ian Green understood my needs and everything was explained very clearly. Ian Green has also assisted me with my tax figures relating to my pension at no further cost.

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

Yes, I am happy with the recommendations I received and I am pleased with the pension provided and these arrangements.

**What could they have done better?**

N.A

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Review from Verified Client

London | January 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My aged mother's financial affairs had not been followed since a previous IFA had embezzled her.

**How did Ian help you?**

With infinite patience and kindness, Mr. Green explained what could be done with my mother's investments and cash in order to consolidate and secure them. He accepted totally my wish for a 'no risk' policy. He repeatedly and kindly explained the costs involved in any management of the funds to my brother.

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

I can act only together with my brother.

**What could they have done better?**

Mr Green could - can - do no more then he has already done to try and explain the advantages of the coherent policy he is recommending.

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Review from Verified Client

London | December 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had received quite a lot of compensation relating to advice given by a previous financial adviser and was keen to find someone who worked for an hourly rate rather than purely on commission.

**How did Ian help you?**

Ian helped put in place new pensions arrangements and life insurance.

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

**hoping for?**

Both plans are still in place and working as intended many years later. I'll go back to Ian as and when circumstances change.

**What could they have done better?**

No obvious areas requiring comment.

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Review from Verified Client

Cambridgeshire | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed to find a Financial Advisor who put my interests at the forefront of his advice.

**How did Ian help you?**

From the start I found Ian Green listened to all that I had to say and took the time to give me advice that was suited to my own particular circumstances. He was clear and concise in not only the advice that he gave but also the reasons for so doing. His has always conducted business with me in a totally professional but friendly manner and has given me an exceptional level of good quality service.

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

I have been delighted with the returns that I have seen from my investments. Ian Green has exceeded my expectations in the management of my portfolio.

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Review from Verified Client

London | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to take a more considered approach to investing for my future.

**How did Ian help you?**

I've recieved a very professional service from Ian - as well as a great performance. I picked Ian from the three people I arranged to meet over a year ago for two reasons. He was by far the most patient and personable, and he was very generous with his time. The other reason was the premises... Perfectly adequate, but no signs of client money being wasted on unnecessary bling is what I thought, and I like that kind of sign. I am very happy with my decision to appoint Ian Green as my financial advisor, and would recommened him to anyone.

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

I've seen a good return.

**What could they have done better?**

Don't change a thing

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Review from Verified Client

London | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Our company had the need to set up a pension scheme so we looked for Financial Advisors. After reaching out to several, Ian was the quickest to respond and the

most helpful.

**How did Ian help you?**

Ian Green was SO helpful in the entire process of setting up a pension plan, setting up the contribution, setting it up with out payroll and everything in between. He is quick to answer any questions, courteous in his communication and patient. I would HIGHLY recommend Ian Green for anyone interested in a financial planner. He is professional and friendly and when the needs arises we will use him again! Thanks, Ian!!!.

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

We hav enow reached a size where we are preparing a group plan.

**What could they have done better?**

Nothing- the whole experience could not have gone better.

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Review from Verified Client

West Sussex | September 2015

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

just clueless and about time I did somethinkg to ensure my future protected.

**How did Ian help you?**

He was recommended to me by my IFA brother when they were working together many moons ago.Ian has looked after my affairs all the while, keeping me in touch with developments and putting me straight where I have no financial nowse.Most of my investments are now easily grouped rather than spread about various financial products/ providers where I was beginning to lose control of 'what was where'He is always prompt with service delivery and always willing to offer advice.



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

so far so good.

**What could they have done better?**

hes there when I need him...or has been so far

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Review from Verified Client

London | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed help with pension transfers and ISAs.

**How did Ian help you?**

I would absolutely vouch for Ian Green. He is extremely professional, completely impartial and has that rare ability of being able to make something that is very complex, easy to understand.

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

Yes, very pleased with the advice and service that Ian Green provides for me.

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Review from Verified Client

London | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

**adviser?**

Help with pension planning.

**How did Ian help you?**

I would happily recommend Ian Green. Ian has provided me with financial advice for about 6 years and I have always valued his extensive knowledge and expertise. Ian is passionate about what he does and is excellent about keeping me updated and informed. I enjoy working with Ian who provides quality advice and a very good service.

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

I am very happy with the advice.

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Review from Verified Client

Avon | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

On-going requirements.

**How did Ian help you?**

Ian has earned a trusted position within both personal and commercial dealings, over time, by providing clear, sound and valuable advice on a number of areas which have proved to be of value. His manner in particular adds value with a clear, no nonsense, approach. Ian always presents well and is very informed across a wide area of knowledge. Extremely highly rated.

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

Very positive outcome on Auto-Enrolment.

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Review from Verified Client

East Sussex | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Bereavement.

**How did Ian help you?**

Ian is a trustworthy consultant who came recommended to me. He laid out clearly and professionally the options, risks and benefits relating to my financial situation. I felt well informed after our initial talk which was very important to me.

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

Yes. Consistent returns on investment and sound responsive advice.

**What could they have done better?**

Nothing

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Review from Verified Client

London | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wanted to ensure I wasn't missing anything with my Pension.

**How did Ian help you?**

I can't praise Ian enough. He is both patient and thorough, I've spoken to a number of Financial Advisors over the years and now that I've found Ian I'll be sticking with him. The advice he has given me has put me in a stronger financial position for the future and his fees have been very reasonable.

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

Still employed working towards retirement.

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Review from Verified Client

Essex | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Untimely, unexpected and early death of my husband.

**How did Ian help you?**

I just wanted to say thank you for all that you have done since you first started to sort out my finances in 1996. At the time of John's death I gave you a wish list of being able to retire early and go on a world cruise. Both these ambitions were met and you have continued to enable me to live a lifestyle above what seemed possible all those years ago. Once again, many thanks and may you continue to go from strength to strength in both your business and family life.

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

Retired, and able to help my children financially and go on the cruises I like to do. So, yes is the answer to the question, and more.

**What could they have done better?**

Nothing. I've been really pleased with the last 19 years of service.

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Review from Verified Client

London | March 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian offered direct and sensitive advice, tailored to my personal situation. He was generous with his time and experience.

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Review from Verified Client

London | March 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I FIRST MET IAN GREEN IN 2012 WHEN I NEEDED ADVICE ON INVESTING MY RECENTLY ACQUIRED RETIREMENT FUNDS. IAN OFFERED VERY SOUND ADVICE WHILST REMAINING IMPARTIAL AND INVESTED ADVANTAGEOUSLY ON MY BEHALF. IAN IS CONSISTENTLY PLEASANT, HELPFUL AND ALWAYS RESPONDS IMMEDIATELY WHEN I NEED HIS HELP. HE SUPPLIES REGULAR UPDATES ON MY INVESTMENTS WITH A PERSONAL TOUCH.

**What could they have done better?**

I HAVE LIMITED KNOWLEDGE OF FINANCIAL MATTERS SO AM UNABLE TO GIVE AN IN DEPTH ANSWER BUT I HAVE NO COMPLAINTS.

Review from Verified Client

London | March 2015

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

I've been using Ian for something like 17 years. His advice has always been well researched and responsive to my needs and I have complete confidence in him. He has also suggested some innovative solutions to some of my financial needs which have been well thought out and explained.

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

'Vanilla' advice is quite inexpensive nowadays and some may feel that Ian's charges are more than they would be willing to pay. I am happy with what I pay and I am sure there are other avenues people could explore with Ian if they prefer a cheaper service.1997

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Review from Verified Client

London | January 2015

★★★★☆ 4.3 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★

Ian is extremely approachable and focused on client needs. He is scrupulously ethical and does not over-sell himself or his services. He has a clear understanding of where each client fits into the overall financial picture, and what kinds of investments/cover that client is looking for. So while listening carefully to what the client wants, he is also forthcoming with proposals for options. He responds quickly to emails and is always helpful when dealing with questions. My impression is that he is cautiously conservative when making financial estimates and always makes clear what risks are involved. He is keen on technology-based approaches to accessing data and tries to make things as simple as possible for the client.

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

I think that even for someone like me, with a reasonable (but by no means expert) understanding of finance, there are aspects of investing which are not obvious. There were a couple of things that were not that clear to me, including the relationship between Ian as advisor and the company that would be in charge of investing my money. I don't mean there were any serious questions about this, but I've been at times a bit confused about who exactly I'm supposed to be dealing with. I think the "architecture" of the relationship between the investor, the advisor and the investment fund could be made clearer.

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Review from Verified Client

London | January 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Everything. He is conscientious, values-driven, and highly knowledgeable in his field. He is also incredibly patient when his clients take an age to return signatures and documents (sorry Ian!). Most of all, he is a thoroughly delightful human being, who takes time to translate financial 'nonsense' into English for those of us with a lesser understanding than he has. I have been with Ian for over 15 years now and cannot imagine anyone else looking after my financial health and retirement plans.

**What could they have done better?**

Nag me more when I need to be jollied along for signatures, etc. But, as you can tell, I'm struggling for content on this question.

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Review from Verified Client

London | January 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Since starting to work with Ian a couple of years ago, I have felt confident about my finances for the first time. He listened to what I had to say and understood, he has pitched my portfolio at exactly the level of risk I am comfortable with. He also embraced my requests for ethical and green funds to be included in my portfolio and did all the analysis needed to ensure that I was able to pick the right ones and understand how these funds perform. Ethical investing is very important to me personally and I feel confident that Ian not only understands, but also values this approach. It is why I first approached him as a potential advisor, and he has fulfilled all my expectations on this front - from how he advises me, and also from how he runs his business and makes his own charitable and community contributions. At times of change he has done a great job of asking me the difficult questions rather than offering me outright advice ... so that it's me making the decisions. All in all it's been a very good and productive working relationship. Ian and all his team are quick to respond and communicate effectively and regularly.

**What could they have done better?**

I don't have any suggestions. I'm happy with the service I receive.

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Review from Verified Client

Dorset | December 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★ [co.uk/img/rating-star-full.jpg](http://co.uk/img/rating-star-full.jpg) style="width: 10px; height: 10px;">

Ian Green originally advised me to invest in a mid-risk category. Since 2011 when my investment commenced I have had an average return of 10% tax paid. Ian also speaks in plain English. He and his staff reply to any queries rapidly.

**What could they have done better?**

There is little that I can see that needs improving upon.



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Review from Verified Client

Hertfordshire | December 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

I always feel that Ian understands our requirements and provides the most appropriate products for us. His approach is to look to the long term rather than 'making a fast buck', and that suits us very well. He is always pleasant to deal with and is supported by a great team in Melissa and Stevie.

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Review from Verified Client

Dorset | December 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★

Ian has consistently returned a rate of 10% since I started with him in September 2011. With his advice I chose a Portfolio that was labelled "medium risk". The other important matter to me is that Ian and his team get back to me rapidly if I have any queries. Further, Ian speaks to me in plain English.

**What could they have done better?**

I cannot think of anything.

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Review from Verified Client

London | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian Green is very helpful, friendly and enthusiastic. He regularly reviews my financial position and responds very quickly to any queries. Most importantly, he gets a good return on the investments.

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Review from Verified Client

London | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian is friendly, knowledgeable, and articulate. I work in financial services and deal with sophisticated products, so am generally well informed of the products he offers, but just never had the time or contacts to appreciate what the right products were for my family or how to actually invest. After the first meeting with Ian I knew he was someone I could trust to invest my funds and take his advice and I wouldn't hesitate to recommend him to my friends and family. He has offered sound advice on ISAs, pensions, mortgages and general long term family wealth planning. He sends extensive and detailed monthly newsletters with updates on markets and what his views are (which again are consistent with the opinions of my work colleagues), and offers a quarterly rebalancing of the investment portfolios which keeps your investment portfolio current and as risk free as possible. Has helped reduce my stress levels around my financial planning and investments as I know they are in safe hands, to the extent I feel guilty when he sends regular reminders to me of the various suggestions he has offered which I haven't got round to looking at!

**What could they have done better?**

Only advice would be to spend time with Ian, be honest with what you want and

listen to his advice!

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Review from Verified Client

London | November 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★

My adviser displays an enormous amount of patience when dealing with a client who is not well versed nor confident in financial matters. My own lack of understanding makes it almost impossible for me to be completely confident in anyone that I have taken all the necessary steps to ensure my financial security, but Ian has done his utmost to help me.

**What could they have done better?**

I think it would be hard to better his efforts on my behalf

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Review from Verified Client

Surrey | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

- Gave me a thorough interview based on a questionnaire to establish the correct degree of risk for my situation.- Gave me a thorough interview based on a different questionnaire to establish what kind of ethical investing would match my interests.- When certain aspects of the on-line application didn't meet my expectations, went to great lengths to provide me with and configure an alternative system for me that fully satisfied my requirements. - Tax and charges are always reported on explicitly, so I know exactly what my current situation is.- The charges are very modest compared to my previous financial adviser's.- My investments are holding up well

despite a challenging market place- The free monthly magazine is always interesting and keeps me informed of current issues in the financial world.

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Review from Verified Client

Cambridgeshire | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian has been our adviser for many years and throughout has shown a thoroughly professional yet personal interest in our financial planning. His regular reviews ensure that our finances are managed to a very high standard, taking away from us the worry and stress of dealing with the ever changing financial world. Ian and his team are easy to talk to and quick to respond to any query. An excellent service.

**What could they have done better?**

There is nothing Ian can do to improve. If there was he would be doing it.

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Review from Verified Client

Dorset | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian's personal service is exemplary. His administration is immensely efficient and he is patient to an immense extent, dealing with every detail which is raised, however trivial.

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Review from Verified Client

Warwickshire | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian, Melissa and the team always take the time to understand what it is you want and provide thoroughly considered responses and advice.

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Review from Verified Client

London | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian provides excellent strategic guidance. He explains things clearly and always acts with complete integrity. Melissa couldn't be more responsive. They are both a pleasure to work with.

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Review from Verified Client

London | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian was professional, informative and organized. I would recommend him without hesitation.

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Review from Verified Client

London | November 2014

★★★★☆ 4.3 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★☆

Ian, listens and analyses our situation very well. Always seems to be on top of the data and process and instils confidence in a daunting subject.

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Review from Verified Client

London | October 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I did quite a bit of research to find a local financial advisor to help me with my pension requirements, Ian's name came up a few times as offering a good service, so I called him up. Ian, realised at our first meeting that I didnt have a clue about pensions and other long term financial planning. He took me through things in pragmatic, easy to understand and follow stages - what can be done and what I can expect in the future - he does not push you in to decisions - he advisors you - giving scenarios of what could/could not happen. I was very pleased with the outcome of Ian's work, he freed up the 25% cash (tax free) that am allowed at 55 and merged two other pensions together advising that I do not touch the my third Policy as the terms which were generous when I took it out many years ago would change and be of substantially less benefit to me in the future. I can absolutely recommend Ian, he is a nice guy as well. Allen Bracchi

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Review from Verified Client

Kent | October 2014

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian understood our needs and circumstances and took the time to check that understanding with us. He uses clear and understandable language when describing financial instruments and was very good at explaining the risks associated with various options

Review from Verified Client

London | October 2014

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

This is still early days for us in working with Ian Green, so hard fully to judge some of the points above as that will take time. But we really appreciate Ian's thoroughness, responsiveness, attention to detail and efficiency: we needed to get our financial affairs in order so there are lots of moving parts and Ian is on top of the whole to do list and ensures he is driving it through and we are getting it all done. He does everything he can to make things easy for us - we especially appreciate the regular envelopes of things to sign, all marked up with post it notes, so we can quickly and easily do what is needed and get it back to him. Ian is also prepared to be challenging and uses his technical knowledge and insight to our advantage - making suggestions of things we hadn't thought of for example. So we are pleased with everything so far and now our portfolio has been in place for all of one quarter we are beginning to see the thoroughness of Ian's operation with regular detailed reports and so far, some positive returns :-).

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

One of my prime motivations in working with Ian is to get everything in order and reduce the time it takes us to manage it: so the more that Ian can do to ensure his

reports and communications are short and snappy, and get the key points across fast - the happier I will be. Whilst I appreciate that getting a full report is right and proper, I would actually much prefer to get a one page summary with the ten key measures I care about than a 28 page report which I will never read and certainly dont want to print!

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Review from Verified Client

Essex | October 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Calls when he says he will. Polite and very easy to talk to and explains everything to me in terms I can understand.

**What could they have done better?**

Cannot fault the service I receive from Iain.

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Review from Verified Client

London | October 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Iain is a great listener and understands what I want my money to do/not do. He outlines proposals clearly and simply and follows up to make sure that these get implemented. Through Iain's advice and planning I have peace of mind that I have financial protection for myself and my family.

**What could they have done better?**

He could chase me harder to get my homework done! It sometimes takes me a



while to get my side of the planning done which wastes time.

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Review from Verified Client

London | October 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★

Ian is good at keeping it fairly simple and uncomplicated. I needed to have someone to oversee a wide range of investments and he's proactively come up with a plan that seems to make sense. He's good at explaining complex subjects and outstanding at keeping in contact. You never have to wait long for a response.

**What could they have done better?**

He does issue regular market updates in a 'unique' format - not necessarily the standard way of communicating financial information. I just look at the headlines and avoid the creative stories....

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Review from Verified Client

Northamptonshire | March 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian is an outstanding guy and a true professional at his job. Very clear at explaining how the products work. His continued management of my pension product has been exemplary.

Review from Verified Client

Hampshire | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Communicates well, understands what we needs, responds very quickly to any queries we may have, continually manages and monitors our investments and advises accordingly. I have a very basic knowledge of finance but with Ian's help of explaining our options in a very simplistic manner I can totally understand the implications of whatever decisions we are looking to make. He is entirely trustworthy and feel confident that he always give me his best advice. He also has the ability to make the financial world interesting and has a great sense of humour (which helps sometimes)!

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Review from Verified Client

London | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian was excellent at giving us up-to-date and relevant information and explaining the options that was available to us. This meant we were able to make informed decisions about our financial situation. He is friendly, easy to talk to and highly knowledgeable. If you are looking for a financial adviser I would highly recommend Ian Green.

Review from Verified Client

London | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I can't praise Ian enough. He is both patient and thorough, I've spoken to a number of Financial Advisors over the years and now that I've found Ian I'll be sticking with him. The advice he has given me has put me in a stronger financial position for the future and his fees have been very reasonable.

Review from Verified Client

Kent | January 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I've switched to Ian from a different IFA in the last few months, so it's fairly early days., but so far I've been very pleased with the service he's provided. He seems efficient and helpful. He's gone out of his way to understand how my husband and I want to work (I.e. avoiding unnecessary paper and travel) and to adapt his way of working to fit with us. It's also a great relief to me to have found an IFA who can engage in a sensible conversation about balancing ethical investment and personal financial security. So far, i'm happy with the advice I've received.

Review from Verified Client

London | January 2014

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian is patient and understands the need to explain in simple terms to those who are

not financially astute. He is also thorough in his updates and reviews.

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Review from Verified Client

Middlesex | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

The service from Ian Green is personalised. He inspires trust. He has demonstrated enthusiasm, experience and commitment to provide advice tailored to my individual circumstances. I haven't felt rushed to make any decisions; my choices have been explained patiently and clearly with transparency about charges and costs. All in all, Ian and his small team are a pleasure to do business with.

**What could they have done better?**

I suspect that the advice from Ian Green may not be the fastest out there, but that is not a criticism. It is worth spending a little more time for considered, well researched guidance when dealing with the complexities of matters like historic personal pension arrangements.

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Review from Verified Client

Oxfordshire | October 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I have know Ian and Melissa for many years and have always found them both very approachable however small the question. They are a great team, Ian explaining in easily understood language how to improve our financial planning and Melissa, behind the scenes, collating all the necessary paper work for signing, clearly highlighting where a signature is required. Melissa especially has always been a great

SOS point of contact for me when previously running a company payroll.

**What could they have done better?**

Carry on doing what you do best do not change!!

---

Review from Verified Client

Oxfordshire | October 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian has been our financial adviser for several years. He is brilliant at what he does, which is to enable us to not to have to worry about, or indeed even have to think very much about, management of our underlying financial security. He has our complete trust to recommend and manage on our behalf the most appropriate products to meet our future needs. His knowledge of the business is simply outstanding. If he recommends that we need to do something then we have no hesitation in following that advice safe in the knowledge that he has done that in our best interests and nobody else's. His communication skills are fantastic - he has the ability to explain the most complex of financial matters that tend to awe the financial novice, in a way that make sense and is immediately understandable. Furthermore, I really like his ability to come fully prepared to our meetings with everything, having anticipated what is needed and so make the meeting an enjoyable social reunion rather than a potentially stressful financial business meeting. To us it all seems so seamless and easy, which is a joy, although I am sure this must belie the extensive pre- and post-meeting work that has taken place and to which we are not privy. Here I must mention Melissa in the 'back office'. Cool, calm and collected - a joy to correspond with - efficient and highly effective. Although 'behind the scenes'; it is clear that she makes a huge contribution to the overall highly successful operation. As a team they are simply unbeatable. I cannot recommend them too highly. And what's more; they are both thoroughly nice people!

**What could they have done better?**

Nothing - just carry on doing what you do best - making our financial planning a simple, easy and stress free affair!

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Review from Verified Client

London | October 2013

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

We have worked with Ian over a number of years at first, with a very much toe in the water approach, but recently on a more in-depth strategy to pre-retirement planning. Ian has always impressed us with his knowledgeable advice, explained in detail and in a way that has made relatively complex concepts easy to understand. We like his approachability. He invests time in understanding what's behind your thinking. He is patient, service-oriented, very professional and straight-forward. We feel our finances are in good hands.

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Review from Verified Client

London | September 2013

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Clear, detailed and comprehensive advice - Have been using this advisor for a number of years, time has proven his advice to be well researched, informed and above all correct. We receive regular contact with performance updates. Efficient office, responses have always been prompt. Very approachable.

**What could they have done better?**

Difficult one. Very little really. Perhaps there is an assumption that we know and

understand more than we actually do about what is a complicated and technical industry - At the end of the day, we trust his integrity and knowledge, we feel in safe hands

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Review from Verified Client

Essex | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I have dealt with Ian for several years now. Ian has a real passion for what he does, he is enthusiastic and very detailed in his approach. I admire the time he puts into his research and I always feel confident he is giving me the best advice he can. I would happily recommend Ian as an IFA to any prospective clients or personal friends. Alister Hall (Director).

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Review from Verified Client

Hampshire | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I have been talking to Ian recently to discuss how I could create the best return on my fairly modest financial resources, especially looking towards creating an income in retirement. Ian has explained the options available to me very clearly, their pros and cons, always taking the time to recap on anything where I have needed further explanation. I have felt under no obligation or pressure of any sort to go down any particular route, nor to make any decision if I haven't feel ready to do so. I always feel my time with Ian is extremely well spent and feel totally comfortable with the advice and information he gives me.

**What could they have done better?**

Could not have done anything better.

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Review from Verified Client

Kent | September 2013

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

excellent financial advisor,very thorough and really good understanding of the financial market. Ian has been able to make everything very understandable in a clear and concise way

**What could they have done better?**

None really, just may be the charges are slightly high.

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Review from Verified Client

London | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian Green was SO helpful in the entire process of setting up a pension plan, setting up the contribution, setting it up with out payroll and everything in between. He is quick to answer any questions, courteous in his communication and patient. I would HIGHLY recommend Ian Green for anyone interested in a financial planner. He is professional and friendly and when the needs arises we will use him again! Thanks, Ian!!!

**What could they have done better?**

Nothing- the whole experience could not have gone better.



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Review from Verified Client

London | June 2013

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Ian took the time to understand my situation & needs, which enabled him to give me the advise and service I required.

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Review from Verified Client

London | May 2013

★★★★☆ 4.3 out of 5

Advice: ★★★★★☆

Service: ★★★★★☆

Value: ★★★★★

Understands my personal situation and is flexible within that.

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Review from Verified Client

Surrey | May 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian was excellent as he gave me some advice that I may not need his services now but could well do in the future. I never felt sold to and would definitely get back in touch when necessary.

**What could they have done better?**

not much

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Review from Verified Client

London | April 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I've recieved a very professional service from Ian - as well as a great performance. I picked Ian from the three people I arranged to meet over a year ago for two reasons. He was by far the most patient and personable, and he was very generous with his time. The other reason was the premises... Perfectly adequate, but no signs of client money being wasted on unnecessary bling is what I thought, and I like that kind of sign. I am very happy with my decision to appoint Ian Green as my financial advisor, and would recommened him to anyone.

**What could they have done better?**

Don't change a thing

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Review from Verified Client

London | March 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I had a number of financial planning issues concerning mortgage, pension, redundancy but I was wary of approaching a financial adviser, as I didnt want to be sold a solution. Ian was excellent he encouraged me talk through the issues and gave me straightforward, clear advice that focused on my position and concerns. He highlighted choices but also gave me advice to help me decide.He is a great listener it felt like talking things through with a very well informed friend. I came away feeling much clearer about my position and options. As my situation changes,

I would not hesitate to go back to Ian for advice.

**What could they have done better?**

Nothing I can think of

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Review from Verified Client

London | February 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian's great - he's looked after my finances for years, starting out when I didn't really have any and now I have lots more as a result of his exertions. He's always very happy to explain everything in words of one syllable only so that you can understand what you are signing up to or the reams of gibberish so beloved of financial institutions. No "gert rich quick schemes" - just good solid advice. I always advise any of my friends needing financial advice to speak to him. And he's a Top Bloke as well

**What could they have done better?**

Nothing

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Review from Verified Client

London | February 2013

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

My adviser keeps me fully informed of the progress of my investment portfolio and makes regular contact to prompt me when an adjustment is advisable/recommended, having regard to fluctuations in the market.He is

extremely approachable and is very quick to respond to any concerns that I might raise regarding my investments. He keeps in touch with the wider Global economy not only from his desk but also from presenting at international conferences.

**What could they have done better?**

There is very little that comes to mind - he is doing well and long may he continue.

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Review from Verified Client

London | January 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian Green explained in plain English the options open to me in respect of my pension "pot". Once agreed he obtained quotations from his database of pensions providers and then completed and submitted appropriate forms to the company who supplied the best deal. All very satisfactory and painless. I was kept informed at every stage.

**What could they have done better?**

Nothing

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Review from Verified Client

London | January 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian explains what he is going to do with my money very well. Not being an expert myself, this is very important to me. He has advised me correctly for years and I am satisfied with the service. Trust is a key issue as well as putting my money in the

hands of someone who know what they are doing!

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Review from Verified Client

Hampshire | January 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian manages our portfolio of all financial investments.He is open and honest and explains our options in a clear and sometimes ingenious way.His enthusiasm is boundless and he genuinely cares about the financial health of his clients.I first met Ian when I was buying his flat, we had a number of problems from my end but he stayed true to his word even though he didn't know me: consequently a couple of years later I made contact and asked him to present.I subsequently appointed him as both my company's and my own Financial Advisor.Both decisions have turned out extremely well and I have recommended him to both family and friends and wouldn't hesitate to do so in the future. Some decisions are extremely important and this must rank in anyone's top five

**What could they have done better?**

Hard to say,he communicates well,he is extremely well informed,he is experienced and he doesn't promise anything he can't deliver.

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Review from Verified Client

London | December 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

From the start Ian explained things in plain english rather than jargon.Also understood my attitude to risk and together we invested to suit my needs and goals

through proper unbiased advice. Service is second to none with regular updates and advice on my portfolio so things can be tweaked rather than just drift along. Ian is also usually always available but should he not be available his staff are always very helpful. Another big plus was that Ian explained his fees from the outset so you know what you are going to pay and you certainly get value for money. I cannot recommend Ian highly enough.

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Review from Verified Client

London | November 2012

★★★★☆ 4 out of 5

Advice: ★★★★★☆

Service: ★★★★★☆

Value: ★★★★★☆

Ian makes often complicated matters easy to understand, which is a great skill. He was patient, helpful and honest in my dealings with him, all of which are important qualities in a financial adviser in my opinion.

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

He could have been a little quicker in sending over the paperwork from our first meeting.

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Review from Verified Client

Essex | October 2012

★★★★★ 5 out of 5

Advice: ★★★★★★

Service: ★★★★★★

Value: ★★★★★★

I would like to recommend Ian without reservation as the best "money man" I have dealt with. His clear and extensive understanding of financial planning is quite evident. His honest and concise approach is both reassuring and very clear. I have worked with Ian for over 10 years, during this time he has advised both my family

and myself on financial planning. Ian has helped add value to my business by offering advice for my employees too. Over time our trust relationship has developed and Ian is the first person on my list when it comes to matters financial. If you haven't already taken the time to sit and discuss with Ian your plans, I strongly recommend you do so

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Review from Verified Client

Avon | September 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian has earned a trusted position within both personal and commercial dealings, over time, by providing clear, sound and valuable advice on a number of areas which have proved to be of value. His manner in particular adds value with a clear, no nonsense, approach. Ian always presents well and is very informed across a wide area of knowledge. Extremely highly rated.

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Review from Verified Client

Middlesex | September 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Personable, knowledgeable and just someone who i trust implicitly and conveys advice and information concisely and in a language I can understand

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Review from Verified Client

Surrey | September 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I first met Ian about 15 years ago when he helped me invest some of my City bonuses. He has always been there for me although not actively advising for the last 10 years. Now that I need some help again he is the first person that I turned to. He is knowledgeable, efficient, friendly, approachable, trustworthy. Everything you need in a financial adviser.

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Review from Verified Client

Wiltshire | September 2012

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★☆

Ian acted as our pension and health care planning adviser in the previous established company I ran. We had turnover of 30M pa and upwards of a hundred employees and Ian's advice to me was invaluable, as was his individual briefings to employees. He was more than able to accommodate that size of business into his portfolio. I am now running a new start up with 25 employees and selecting Ian to be our adviser was one of the easiest decisions I had to make. I have already found that his personalized service has been very well received by my new employees and also by the management team.

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Review from Verified Client

London | September 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★



Thanks, as always, for your meticulous admin - I can't tell you how nice it is to know that you handle all the paperwork so efficiently. I will definitely continue to recommend you to friends and colleagues

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Review from Verified Client

London | September 2012

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Ian's expert advise along the way has been invaluable. He's always on hand for questions.

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Review from Verified Client

London | September 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

My Wife & I recommend Ian and his team at Green Financial to anybody looking for trustworthy and makes sense advice in relation to their financial affairs. Green Financial advise us on all aspects of our personal financial planning, which includes fund management of our investments. Because our personal and business affairs are quite closely linked Green Financial also manage our company pension funds. In summary, Green Financial give us easy to understand advice (no financial jargon), which is all designed to secure our financial future.

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Review from Verified Client

London | September 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I would be happy to vouch for Ian Green. Although it is only just over a year since he took over managing my investments and those of my wife, in that time he has been extremely helpful and informative, and his regular newsletters keep us pleasantly and humorously informed about the markets and the economy generally. He is also very quick to respond to any queries.

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Review from Verified Client

West Sussex | August 2012

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

He was recommended to me by my IFA brother when they were working together many moons ago. Ian has looked after my affairs all the while, keeping me in touch with developments and putting me straight where I have no financial knowse. Most of my investments are now easily grouped rather than spread about various financial products/ providers where I was beginning to lose control of 'what was where'. He is always prompt with service delivery and always willing to offer advice.

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Review from Verified Client

East Sussex | August 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian is a trustworthy consultant who came recommended to me. He laid out clearly

and professionally the options, risks and benefits relating to my financial situation. I felt well informed after our initial talk which was very important to me.

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Review from Verified Client

London | August 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I've known Ian for many years, he was the first adviser I ever used. I liked him straight away; his advice felt honest and straightforward and he seemed like a great guy. Over the years my initial view hasn't changed - I get great advice, great service, at a good price from someone I like and trust. Regarding specific advice I've had I've always liked the fact it's very well explained and takes into account my personal views of risk. Charges have always been clear and easy to understand and the service I get has never been anything other than extremely professional.

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Review from Verified Client

Surrey | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian has always given honest and balanced view of my finances. He has a fantastic ability to explain seemingly complicated financial terms and processes in simple and easy to understand terms. He is very well organised, and always follows up actions and returns calls! I always leave my meetings with Ian feeling positive about my finances. I have no hesitation whatsoever in recommending Ian.

Review from Verified Client

Cambridgeshire | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

From the start I found Ian Green listened to all that I had to say and took the time to give me advice that was suited to my own particular circumstances. He was clear and concise in not only the advice that he gave but also the reasons for so doing. His has always conducted business with me in a totally professional but friendly manner and has given me an exceptional level of good quality service.

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Review from Verified Client

London | July 2012

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★

I would happily recommend Ian Green. Ian has provided me with financial advice for about 6 years and I have always valued his extensive knowledge and expertise. Ian is passionate about what he does and is excellent about keeping me updated and informed. I enjoy working with Ian who provides quality advice and a very good service.

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Review from Verified Client

Norfolk | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We have found Ian Green to be, honest, plain speaking and very knowledgeable in

all the advice he has provided. Mr Green was very thorough in assessing the level of risk that we wanted to take when investing our savings, and consequently his advice was taylored to our individual needs. He has continued to be accessible whenever we have felt the need to clarify any concerns. The service provided by Green Financial has been second to none, and we have no hesitation in recommending him.

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Review from Verified Client

Berkshire | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian is a genuinely honest and very smart person

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Review from Verified Client

Kent | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Ian is fun to deal with. He is clearly well-informed and is able to distil complex information so that even a lay-man like me can understand what is going on. He is quick and efficient in dealing with queries; administration is accurate and swift. The investments which he has recommended have performed ahead of expectations. Regular newsletters keep us up to date.

Review from Verified Client

Warwickshire | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I'm not given to hyperbole as a rule but Ian has provided a level of service far beyond my experience of any other provider of anything. He is able to articulate complex matters in very clear and easily understood terms, making decisions easy to conclude, and he will always give you the ground-truth; warts and all.

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Review from Verified Client

London | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I would absolutely vouch for Ian Green. He is extremely professional, completely impartial and has that rare ability of being able to make something that is very complex, easy to understand.

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Review from Verified Client

East Sussex | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

From the start Ian has taken into account what I have said and provided advice accordingly. He has always been clear on why he has recommended certain options over others and been happy to answer whatever questions I have had. He has also provided warnings of pitfalls on certain courses of action, but never forgets the final choice lies with the client.

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Review from Verified Client

Gloucestershire | July 2012

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Clarity, diligence, trustworthiness. (and patience!)

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Review from Verified Client

London | July 2012

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Ian explained everything to us in a way that we all (who were not clued up on pensions) understood, and has been straightforward, honest and helpful throughout our dealings with him. Would definitely recommend him.