

Client Reviews

Victoria Ward

Square One Wealth Management



4.9 out of 5

Review from Verified Client

Somerset | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

As explained to Victoria, we want to have some extra monies available to spend in our later years.

How did Victoria help you?

Victoria was utterly professional and extremely patient and kind. She tirelessly explained everything to us and we felt that she had nothing except our best interests at heart for which we are extremely grateful.

Have you seen the outcome you were hoping for?

Hopefully, we are well on our way to achieving our aim with regard to obtaining an Equity Release on our home.

What could they have done better?

In our opinion NO.

Review from Verified Client

East Sussex | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My wife and I have had an investment for many years as an offset to our mortgage and retirement plan

How did Victoria help you?

Victoria and her company took over from our previous financial advisor and in the past few years has kept us well informed and updated on our finances and options.

Have you seen the outcome you were hoping for?

The markets have had a bad year but all in all yes

What could they have done better?

Nothing comes to mind

Review from Verified Client

East Sussex | December 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I retired early and needed to know how to best manage my fund.

How did Victoria help you?

She took over from someone who was not very good.

Have you seen the outcome you were hoping for?

Yes very conscientious.

What could they have done better?

Not sure.

Review from Verified Client

London | December 2020

★★★★☆ 4.3 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★☆

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

We were already a client with a previous advisor who left the practice. Victoria took over our affairs, advising on financial savings and investments for myself and my husband

How did Victoria help you?

Victoria took time to understand our needs, is very responsive to questions and clear in her advice and communications.

Have you seen the outcome you were hoping for?

As it stands currently, yes

What could they have done better?

Nothing that we can think of currently.

Review from Verified Client

Middlesex | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We have used Viky's services for so long that I honestly can't remember the first thing she helped us with

How did Victoria help you?

She has reorganised our investments, set up ISAs & helped to move a couple of small pensions & one large one

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

London | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Previous adviser left company.

How did Victoria help you?

Clarity of advice.Accessible explanations.

Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

East Sussex | December 2020

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement and need to invest lump sum.

How did Victoria help you?

Took us carefully through the processes, explained the issues in terms we could follow, kept us in touch and up to date, explained risks in changing market, made recommendations and reasoning.

Have you seen the outcome you were hoping for?

Yes, in an uncertain world.

Review from Verified Client

Kent | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had previously managed my (non-pension) investments independently but decided to appoint an professional. Initially I was looked after by another Square One Advisor but, upon his departure from the firm, Victoria took responsibility for my portfolio, and also that of my mother, which I oversee.

How did Victoria help you?

Initially, Victoria undertook my annual review. Following the market dip on the back of the epidemic, Victoria helped me to reassess the portfolio to take advantage of the expected recovery.

Have you seen the outcome you were hoping for?

Yes, we've recovered more than we lost in the initial crash.

What could they have done better?

Realigning investments took longer than it would have done had I been working independently, but I understand the need for complete documentation and a thorough audit trail. An increase in red tape is the trade off against having professional advice.

Review from Verified Client

Kent | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

The need for professional investment advice

How did Victoria help you?

My wife and I had financial savings and inheritances which we wished to invest safely and with profit. We decided to appoint a Financial Adviser. Upon the recommendation of a number of friends, and after due diligence, we appointed Square One Wealth Management in the early 1990's. In due course Victoria Ward was given responsibility for our financial portfolio. Victoria addressed our requirement for low risk, secure, ethical, medium term investments. Her investment advice has proved to be in our best interests. She has always acted in a most professional, sympathetic manner. Most recently guiding us through the process of setting up a family trust. Although personal visits have been suspended due to the present Covid crisis, contact has been maintained by telephone, internet and postal communications. Overall we have found Victoria, as a representative of the company, to be most efficient and always on hand to answer any queries. Our portfolio has grown over the years and, due to the worldwide epidemic, recent growth has been restricted; however, we feel confident that Victoria will continue to give us appropriate investment advice. Her empathy and ability to reassure the older, rather nervous, client is notable.

Have you seen the outcome you were hoping for?

yes

Review from Verified Client

West Sussex | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had a number of pensions and was looking to consolidate them, therefore I was looking for the best advice on how to go about it.

How did Victoria help you?

Victoria identified one of the pensions I had was a potential risk due to the structure of the investments, we discussed my options and she presented me with low to medium risk investment that I was extremely happy with.

Have you seen the outcome you were hoping for?

Most definitely.

What could they have done better?

Victoria always sends me regular updates as and when required and we review my investments annually or sooner if required. She is doing everything I would expect her to do.

Review from Verified Client

West Sussex | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To plan my finances for rety

How did Victoria help you?

Advice on retirement planning

Have you seen the outcome you were hoping for?

Increase in pension pot

Review from Verified Client

Surrey | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Victoria took over from a previous advisor

How did Victoria help you?

Victoria has helped us immensely by listening and advising

Have you seen the outcome you were hoping for?

we are relatively new clients, but are very pleased so far

What could they have done better?

So far we do not think Victoria could have done any better and worked harder for us than she has

Review from Verified Client

London | September 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pensions advice.

How did Victoria help you?

She was very thorough, patient and professional.

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

Yes.
