

BRIAN FLINDALL

Background report to support inclusion
in the **2023 Guide To The UK's Top
Rated Financial Advisers**



Brian Flindall







Credencis










Top Rated 2023

4.9 / 5  166 reviews

VouchedFor checks:

-  FCA status: Certified by Firm
-  Recent Client Reviews
-  Independent Financial Adviser
-  Qualifications Uploaded
-  Transparent Fees
-  Positive First Impressions

Services offered

-  Investments and Savings
-  Pensions
-  Retirement income (annuities, drawdown)
-  Pension Transfers - Non Specialist
-  Inheritance Planning
-  Equity Release
-  Insurance & Protection

+ 2 more services

Qualifications listed

Standard Qualifications: 11 Qualifications

PFS - Member by Diploma

CII - Mortgage Advice Qualification

CII - Diploma in Financial Planning

CII - Certificate in Life & Pensions

CII - Certificate in Financial Planning & Long-Term Care Insurance

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

Client & First Impression Reviews

Brian Flindall

Credencis



4.9 out of 5

Review from Verified Client

Nottinghamshire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Early retirement.

How has Brian helped you?

Yes.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing

Review from Verified Client

Derbyshire | February 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Starting a pp

How has Brian helped you?

Advised me on the right direction to go with my money

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Essex | February 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I have found Brian to be pro-active in assessing our needs and requirements and genuinely concerned for the outcome of investments.

How has Brian helped you?

We have realigned the portfolio of our investments, to reflect our risk profile, whilst targeting funds and the like that have a positive track record.

Have you seen the outcome you were hoping for?

In an extremely volatile market post Covid / Truss-economics & the current Ukraine war, our portfolio has increased in value.

What could they have done better?

Nothing comes to mind, again in a volatile market, Brian has performed well for us.

Review from Verified Client

Derbyshire | February 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension drawdown

How has Brian helped you?

Honesty professional advice

Have you seen the outcome you were hoping for?

Ongoing advice and support

What could they have done better?

Nothing

Review from Verified Client

Derbyshire | February 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Unhappy with previous pension provider

How has Brian helped you?

Transferred my pension to a better pension provider

Have you seen the outcome you were hoping for?

yes

What could they have done better?

Nothing

First impression from a user who is not yet a client

February 2023

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

It was great to meet Brian today, He is very polite,very professional and very informative. I would definitely recommend his services.

Review from Verified Client

Nottinghamshire | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Hes continuing to manage my pension while I'm overseas

First impression from a user who is not yet a client

December 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Met with Brian to look into my pensions he's great guy gave me good advice

Review from Verified Client

Derbyshire | November 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Brian was recommended to us by a close friend

How has Brian helped you?

We found his advice and experience in the pension planning medium of a high quality. He regularly keeps us updated and we also have annual meetings to discuss how our plans are progressing. Would and have recommended him to colleagues and family that were looking for a good financial planner

Have you seen the outcome you were hoping for?

Due to the financial instability of the last 12 months, although our money invested has fallen it is not as bad as the market average fall during this period

What could they have done better?

Nothing, Brians advice was good.

Review from Verified Client

Derbyshire | November 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian gave me sound advice on the investment I have made within the current climate.

Review from Verified Client

Derbyshire | September 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I suffered a stroke three years ago and need professional advice regarding my pension pot and options available.

How has Brian helped you?

Brian provided an excellent service in producing a report and advice on a number of schemes that I had acquired whilst working for a number of medical companies throughout my career that was cut short. Advice on each product and which would be best to release and best to keep, this made my decision much clearer and peace of mind for the short and long term.

Have you seen the outcome you were hoping for?

I receive regular updates and information via email updates and news letters which keep me up to date with relevant events.

What could they have done better?

Nothing, extremely happy with the service provided.

Review from Verified Client

Derbyshire | September 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking to transfer a pension as a cash lump sum and release 25% of it tax free.

How has Brian helped you?

Brian gave me sound and easily understood advice on pension transfers including advice on the risks involved. He also did all the work in transferring my pension and kept in touch answering any questions I had during the process.

Have you seen the outcome you were hoping for?

Yes. I'm very pleased with the outcome. Everything went really smoothly.

What could they have done better?

Nothing could have been better. I found Brian to be friendly, very informative and easy going.

Review from Verified Client

Nottinghamshire | September 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To gain an understanding of our pension pot and when we could retire comfortably

How has Brian helped you?

Brian reviewed our pensions and identified where we would benefit the most, including giving us an estimated retirement age. Brian listened to our future plans

Have you seen the outcome you were hoping for?

Yes, our pension growth is healthy. All the information given by Brian was transparent and honest

What could they have done better?

N/A Happy with the service provided

Review from Verified Client

Nottinghamshire | September 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension release

How has Brian helped you?

By consolidating all my money all together so it is easier for me to keep track of what I have

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Nottinghamshire | September 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Early retirement

How has Brian helped you?

Advised how to manage fund

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

First impression from a user who is not yet a client

July 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Brian is always on time and is always happy to help he will go above and beyond to help you as much as he can he was so knowledgeable when it came to my pension and told me the best way forward

Review from Verified Client

Leicestershire | June 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has helped my family in reinvesting money after my fathers passing. Advice on other personal financial matters and company matters too.

Review from Verified Client

Derbyshire | May 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Requirement for a pension.

How has Brian helped you?

Advising over many years, whenever I required financial advice.

Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Derbyshire | May 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has done a full review of our pensions and advised me on what options are available to us, he also reviewed our mortgage and advised us to stay where we are which is refreshing and shows his commitment to us as more than customers, I have recommended him to friends and family simply because of his honesty where the client certainly comes first.

Review from Verified Client

Nottinghamshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Turned 50 years of age and wanted advice

How has Brian helped you?

Sorted mortgages transferred my work pension

Have you seen the outcome you were hoping for?

Definitely

What could they have done better?

Nothing

Review from Verified Client

Oxfordshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian always gives sound advice. He doesn't tell me what to do just offers informed choices.

Review from Verified Client

Nottinghamshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

I was concerned about my pension after COVID hit and the loss it had made over that period. Brian came over talked me through my concerns and reassured me. Everything he told me regarding the recovery of my pension pot was correct and happened.

Review from Verified Client

Nottinghamshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has assisted with my uncertainty of what to do with an inheritance from my late mother. He found the most appropriate product for me, and was efficient and mindful of my circumstances when dealing with the investment. He ensured I was happy with my choices. He also assisted in releasing funds from a previous investment, a process I would have found daunting.

Review from Verified Client

Nottinghamshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Regular emails and phone conversations have kept me in the loop

Review from Verified Client

Derbyshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Yes Brian keeps in touch with me which is reassuring to know

Review from Verified Client

Derbyshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has never let me down on advice and investment, he is so on my level when discussing my finances , also I look on him as a friend.

First impression from a user who is not yet a client

April 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

I have really enjoyed Brian's support, as he showed a high level of professional ethics that was amazingly delivered with an need to listen, ask important questions and empathy. I found it relatively easy to quickly build a high level of trust with him, that was developed around his values for honesty and confidentiality. I could easily continue with a long list of more positive facts, but also aware that his is a humble man, so will leave it there

Review from Verified Client

Derbyshire | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

We agreed no changes to my policies and we were both happy with the outcome.

Review from Verified Client

Derbyshire | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Good advice and clearly went through next options

First impression from a user who is not yet a client

March 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Brian's advice and support was incredibly helpful. He was really down to earth, and answered my questions with clarity and detail. I certainly left feeling much clearer about my options moving forwards, and would highly recommend Brian to anyone looking for financial advice.

First impression from a user who is not yet a client

February 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Brian was patient, down to earth, and really helped me to achieve the basic level of understanding that I needed.

Review from Verified Client

Nottinghamshire | December 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian is helping to managed my pension while I'm working in Australia - and he doing a wonderful job

Review from Verified Client

Middlesex | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had many pension plans and was looking to consolidate them. Brain came as a recommendation so I approached him.

How has Brian helped you?

Reviewed all my pensions and explained each one in turn. Found the best solutions for me and did all the transfer work.

Have you seen the outcome you were hoping for?

Yes have started to.

Review from Verified Client

Derbyshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I contacted Brian back in May 2021 after being given his name by a friend as I was due to retire and had two large pensions that I required advice on

How has Brian helped you?

Brian advised me to combine the two pensions and then took me through ways of what could be done with it. He also asked questions to see what sort of risk I would prefer. I was happy with his advise and asked him to look after it for me. He also advised that investments could fall as well as rise.

Have you seen the outcome you were hoping for?

Yes I have, He advised a Royal London investment which meets my requirement [Inc 25% tax free release that I required]. In the 3 months of investment, my portfolio has risen by 4%. I intend to take drawdown in the next financial year starting April 2022

What could they have done better?

Nothing, his advise was excellent [I pre-checked that he was authorized to carry out the advise he gave me and also noted good independent references for him on this site

Review from Verified Client

Lincolnshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

BSC Pension

How has Brian helped you?

got the ball rolling in 2017

Have you seen the outcome you were hoping for?

yes when i turned 55

What could they have done better?

nothing really

Review from Verified Client

Suffolk | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Brian provides sound, honest and clear direction with regards to financial management and pensions. I found it refreshing to talk to Brian and take his advise on money matters and where best to invest. I look forward to our catch ups to review how my investments are progressing.

How has Brian helped you?

Financial investments, pensions and transfers

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

At the moment I am more than happy with the service provided

Review from Verified Client

Derbyshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To look at my longer term financial planning

How has Brian helped you?

He scoped out all my financial needs and helped me put a realistic plan in place to achieve my goals by my retirement age.

Have you seen the outcome you were hoping for?

Its too early to see from what I do know the pensions are performing extremely well.

What could they have done better?

No, perfect service for what I needed. Plain speaking, no jargon and really helpful.

Review from Verified Client

Nottinghamshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Having a lot of pensions needed advice of what to do

How has Brian helped you?

Top Quality advice about all my pensions and what to do with each one

Have you seen the outcome you were hoping for?

Yes they have been moved into a better place

What could they have done better?

Nothing

Review from Verified Client

South Yorkshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was put in contact with Brian through a member of the family as I was looking to start a private pension

How has Brian helped you?

Brian gave me excellent advice on a private pension, transferring funds and ultimately setting one up.

Have you seen the outcome you were hoping for?

So far I am happy with the service I have received

What could they have done better?

At the moment there is nothing that I believe could have been improved

Review from Verified Client

Derbyshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to retire so that I could care for my husband who has a rare blood cancer.

How has Brian helped you?

Brian helped by consolidating my pensions, allowing me to take a tax free lump sum which meant I was able to retire early.

Have you seen the outcome you were hoping for?

Yes, there were no problems and we are both grateful for the help and advice that we received.

What could they have done better?

Nothing, no complaints we are very pleased with the service.

Review from Verified Client

Nottinghamshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Need to release funds due to surgery.

How has Brian helped you?

Brian gave me clear advise and options and was not put under any pressure. A pleasent experiance for someone who had never looked for advice in the past, and was made to feel comfortable and at ease.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Not a lot

Review from Verified Client

Leicestershire | June 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Father passing away

How has Brian helped you?

Planning for the future along with help with financial planning on a new house build

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

First impression from a user who is not yet a client

May 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Brian was brilliant, friendly and knowledgable. We approached brian for help with our pensions and we couldn't have received better service. We will definately be using Brian again in the future and would highly recommend him.

Review from Verified Client

Derbyshire | May 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

With further advice as and when required.

Review from Verified Client

Derbyshire | May 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian contacts us not too often to update us, my pension is flying which is totally down to me acting on the advice i was given backed up by hard facts. I am very happy with the service provided even though I can be hard to please.

Review from Verified Client

Derbyshire | May 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has continued to help get the best return on my personal pension

Review from Verified Client

Nottinghamshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has been able to provide a more preferable fund which allowed me to release some money and reinvest the remaining with companies giving a better return on my investment.

Review from Verified Client

Oxfordshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

With support and sound informed advice

Review from Verified Client

Derbyshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

I need advice about transferring a pension

Review from Verified Client

Cornwall | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

He helped me obtain a greater understanding of my pension how it works and on how to maintain it going forward into retirement just good house keeping advice.

Review from Verified Client

Derbyshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

He has helped me withdraw some money from my pension.

Review from Verified Client

Derbyshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has helped/advised and facilitated money release from another fund which was great ?

Review from Verified Client

Derbyshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Because of the Covid virus I havent visited Brian at his offices for a one on one update. But Brian regularly keeps me updated on any changes connected with my pension and its investments. I know that a phone call or an e-Mail to Brian will result in him answering any queries that I might have.

Review from Verified Client

Nottinghamshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Conscious of Covid safety and always circumspect and professional, Brian contacted me to let me respectfully know that I needed to update the trustee to my savings/investments after a suitable time following my partner's death, also advising a change of will, something I had put to the back of my mind, and for which I was grateful. He was able to advise on monies from deferment of State pension after I requested help/advice. Over the years Brian has always steered me in the right direction and has made a good deal of money for me despite the fluctuating fortunes of the economic market. He has been a boon.

Review from Verified Client

Derbyshire | April 2021

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Early retirement and pooling of 5 pension funds

How has Brian helped you?

Sound advice which was easy to understand and answered all my questions

Have you seen the outcome you were hoping for?

Yes and more

What could they have done better?

No area of concern

Review from Verified Client

Nottinghamshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Required assistance with my pensions as they where not performing to their full potential.

How has Brian helped you?

Brian gave me great advice, helped me u sweat and my pensions in great detail and found the best plan for me.

Have you seen the outcome you were hoping for?

I have already seen a huge rise in my pension pot and I am so grateful for Brians help. I would recommend to all and have done already to anyone who will listen.

Review from Verified Client

Derbyshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Not to good with finance

How has Brian helped you?

Tremendously he pointed me in the direction financially to suit my means

Have you seen the outcome you were hoping for?

Yes and more

What could they have done better?

Nothing at all

Review from Verified Client

Derbyshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to take early retirement to look after my terminally ill husband.

How has Brian helped you?

Brian helped with his advice on pensions.

Have you seen the outcome you were hoping for?

Yes, I will be retiring at the end of the month.

What could they have done better?

Nothing, the excellent advice that we received was exactly what we needed. Brian kept us informed and was very professional.

Review from Verified Client

Derbyshire | March 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Helped with long term investments for my retirement.

First impression from a user who is not yet a client

March 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Very easy to understand, explained in a efficient manner

First impression from a user who is not yet a client

March 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Brian explained everything I needed to know very clearly so I could understand, he answers my questions, he didn't rush me and was happy to explain things again till I was happy, I would definitely ask Brian for more help if I needed it

Review from Verified Client

Derbyshire | March 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking to take a lump sum from my pension pot

How has Brian helped you?

He explained the situation in detail and easy to understand, no jargon and if there was he explained this in simpler terms

Have you seen the outcome you were hoping for?

Through no fault of Brian we decided not to proceed however if we decided to proceed in the future Brian will be the first I call

What could they have done better?

Nothing really

Review from Verified Client

Nottinghamshire | February 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wasnt happy the way my pension was growing

How has Brian helped you?

Professional advice right from the get go , very easy too understand Brians forward progressions .

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing, very happy with the service provided

First impression from a user who is not yet a client

February 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

I found Brian to be extremely helpful when I enquired about my Pension. He gave me some invaluable advice and was very friendly, open and honest throughout.

First impression from a user who is not yet a client

February 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Clear advice & without jargon. Honest opinions based on his experience & with my requirements uppermost in his thoughts.

Review from Verified Client

Oxfordshire | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had a number of pension plans with various providers and none of them were very easy to understand. I needed someone to consolidate and explain how I stood financially.

How has Brian helped you?

Brian helped draw together all the different pots, assessed what type of pension plan I wanted based on my attitude to financial risk and then completed the paperwork very smoothly.

Have you seen the outcome you were hoping for?

Absolutely, I understand and can follow my future pension arrangements now and feel that I have a better understanding of my financial position. Regular reviews allow me to monitor my progress, I recently increased my premiums voluntarily and again this was easy to arrange. Pensions are not the easiest areas of financial planning but Brian has helped make things more simple.

Review from Verified Client

Derbyshire | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Need to sort out my pension and investment help

How has Brian helped you?

Put all my little pensions into one which is now growing nicely

Have you seen the outcome you were hoping for?

Definitely

What could they have done better?

He's making me money and that's alright by me

Review from Verified Client

Outside UK | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed to transfer pension so I could withdraw some

How has Brian helped you?

Changed my pension to one I could cash in

Have you seen the outcome you were hoping for?

Yes I have

What could they have done better?

To be honest Brian was professional from start to finish

Review from Verified Client

Nottinghamshire | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

underperforming pension fund from previous employer

How has Brian helped you?

discussed options, arranged transfer

Have you seen the outcome you were hoping for?

yes

Review from Verified Client

South Yorkshire | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Previous investments

How has Brian helped you?

Provided a route to maximise our investments

Have you seen the outcome you were hoping for?

Only just completed relevant actions

What could they have done better?

Nothing at the moment

Review from Verified Client

Leicestershire | January 2021

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

How has Brian helped you since your last review?

During a difficult time for myself, Brian advised me on certain funds that he thought might perform well regarding my pension portfolio. I invested in the said funds, and his advice has appeared to be very sound so far, as these funds have achieved good growth in the last few months. I've not had much time to spend researching the market myself, so his help was much appreciated in this area.

Review from Verified Client

Oxfordshire | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian had continued to provide expert advise and allayed any fears throughout these uncertain financial times . Im confident of a secure and prosperous future due to Brians personal and professional service.

Review from Verified Client

Nottinghamshire | December 2020

★★★★★ 4.7 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★☆

How has Brian helped you since your last review?

Brian switched our investment to another plan because the poor performance of our existing arrangements it has proven to be good advice

Review from Verified Client

Derbyshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension help

How has Brian helped you?

By applying for drawdown on my behalf

Have you seen the outcome you were hoping for?

yes

Review from Verified Client

Nottinghamshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian is always available to help with great professional advice

Review from Verified Client

Derbyshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian continues to give me excellent ongoing pension advice which has allowed me to take early retirement.

Review from Verified Client

Derbyshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

We wanted some investment advice, Brian is easy to talk to & doesnt bombard you with endless waffle & scenarios. Im sure if you wanted that hed happily oblige, but we just had a few queries that he responded to promptly & professionally.

Review from Verified Client

Derbyshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has been great in helping me set up a shares portfolio, his knowledge is exceptional and look forward to future investments with him..

Review from Verified Client

Nottinghamshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian has helped with financial advice with me drawdown pension.

First impression from a user who is not yet a client

May 2020

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Brian

Very professional, clear in explaining everything , felt very reassured and comfortable with all aspects covered in general very happy and satisfied

Review from Verified Client

Nottinghamshire | May 2020

★★★★★ 5 out of 5

Value: ★★★★★

Service: ★★★★★

Advice: ★★★★★

How has Brian helped you since your last review?

Gave me a detailed understanding regarding my pension

Review from Verified Client

Oxfordshire | May 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My pensions were in a bit of a mess, and I wanted them streamlined. So under a friends recommendation, I contacted Brian.

How has Brian helped you?

Brian swapped my old stagnant pension into two different schemes, they have since both seen major growth.

Have you seen the outcome you were hoping for?

Absolutely, above and beyond expectations.

What could they have done better?

There isn't anything that comes to mind, our dealings have always been more than satisfactory. Brian is a very personable, and flexible professional.

Review from Verified Client

Warwickshire | May 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

he has advised through difficult times.he keeps me up to date and has been providing additional information during these trying times of lock down.he continues to provide excellent advice and works at a level of communication between advisor and client on an individual basis.

Review from Verified Client

Derbyshire | May 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Seeking to start my first private pension many years ago.

How has Brian helped you?

Brian has helped me by advising me on mortgages, investments, life insurance and pensions.

Have you seen the outcome you were hoping for?

Investments have not been as lucrative as I would have liked, but this has been due to the World 'financial climate,' not a reflection of advice received from Brian.

What could they have done better?

I am satisfied with the service I receive from my financial adviser.

Review from Verified Client

Derbyshire | May 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

BrianAdvices us how to get the best returns whilst saving money, i have recommended him to friends and all are highly impressed with his standards of service, if he thinks your money is already in the best place - he tells you it is.

Review from Verified Client

Nottinghamshire | April 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★

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

The need to review my financial future in terms of my pensions and to potentially amalgamate 2 into one.

How has Brian helped you?

We have been using Brian for many years now. Brian found a company for me to transfer my pension to a company with a better return and with in that to select funds which could increase my pension value.

Have you seen the outcome you were hoping for?

Yes, I have

What could they have done better?

Brian has tried to have annual reviews with me that I haven't always followed through.

Review from Verified Client

Derbyshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To help with my personal pension

How has Brian helped you?

Brian gave me excellent advice regarding all aspects of my personal pension

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

I have been very pleased with all aspects of Brian's advice

Review from Verified Client

Derbyshire | April 2020

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed to consolidate my various pension pots, with the intention of maximising the investment capabilities.

How has Brian helped you?

Brian recommended I set up a drawdown pension and carried out a lot of detailed work. He placed the pot in investments that are in line with my attitude of risk and my ethical preferences.

Have you seen the outcome you were hoping for?

I am delighted with the outcome. I remain one of Brian's clients and am likely to stay with him. Given the unusual times we live in, Brian's advice is valued.

What could they have done better?

I can't identify any areas. Brian has carried out my wishes and provided a product I am happy with.

Review from Verified Client

Derbyshire | April 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Collating and reinvesting pensions

How has Brian helped you?

Give good easy to understand advice and acted on my behalf to sort out a plan best suited to my needs

Have you seen the outcome you were hoping for?

So far yes

What could they have done better?

More than happy

Review from Verified Client

Derbyshire | April 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I had a reasonable sum upon my retirement and opted to seek expert advice. Out several companies I settled on Credencis as my best option.

How has Brian helped you?

He went to great lengths to establish my risk preference and which companies he considered my best options.

Have you seen the outcome you were hoping for?

To a great extent yes, but I didn't foresee how much the administration costs would be.

What could they have done better?

I can't think of anything at the present time, but I am sure that the investment companies are very well paid - and probably earn it. If the investment is sound & the market is good it is better than relying on small interest savings accounts. As Brian told me it is a long term investment.

Review from Verified Client

Devon | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We need someone we could trust to manage my husbands pension pot.

How has Brian helped you?

He informed us of all of our options without influencing us

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing I can think of that would give a better outcome

Review from Verified Client

Derbyshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had frozen my pension for a number of years

How has Brian helped you?

He transferred all 3 of my pensions into 1 with ease

Have you seen the outcome you were hoping for?

We had seen a great return on investment,

What could they have done better?

He is a matter of fact sort of guy who gives you his honest opinion in what is best for your situation

Review from Verified Client

Nottinghamshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed some understandable and impartial advice about my pension plans and my retirement planning for the future.

How has Brian helped you?

He looked at my pension with my former employer and my current money purchase arrangement with my new employer and made recommendations and consolidated my pension plans.

Have you seen the outcome you were hoping for?

Yes I have moved forward with my existing pension in the last 12 months and I am now saving more for my retirement and maximizing my tax relief allowances.

What could they have done better?

He didnt do anything that i was unhappy with and kept me informed at every stage of the process.

Review from Verified Client

South Yorkshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

How has Brian helped you since your last review?

Brian is always there for you during these challenging and worrying time his commitment to myself and wifes investment (s) is second to none . We had advice via a web link / phone conversation that went relitively smoothly he took on board or concerns re our investmetns for the future and reassured us that all will turn around in the future.

Review from Verified Client

Derbyshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pensions Investment

How has Brian helped you?

Put on the right Pension Investment.

Have you seen the outcome you were hoping for?

No not yet

What could they have done better?

Not a lot at the moment at the times we are going throw at Present. Hopefully we can look forward to a better future.HO

Review from Verified Client

Nottinghamshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed to get a mortgage I wanted to transfer my pension

How has Brian helped you?

He found me an affordable mortgage over a term I wanted.He advised me on my options for my final salary pension and transferred it to a better option with the benefits I required.

Have you seen the outcome you were hoping for?

No yet as this was in preparation for my retirement

What could they have done better?

Nothing everything was satisfactory

Review from Verified Client

Yorkshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed somewhere to place our money to help keep up it's value

How has Brian helped you?

Pointed us to the right investment.

Have you seen the outcome you were hoping for?

Too early yet to say

What could they have done better?

Nothing they were spot on

Review from Verified Client

Derbyshire | April 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed professional advice.

How has Brian helped you?

Explained our options after research.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Always been happy with advice and options.

Review from Verified Client

Derbyshire | April 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Clarity of advice given to me. Good explanation of how my pension is performing

How has Brian helped you?

Brian makes sure the the money I have invested makes as much money as possible

Have you seen the outcome you were hoping for?

Yes my funds always hold their own and usually make some profit

What could they have done better?

Nothing really as I am satisfied with the service Brian gives me

Review from Verified Client Advice: ★★★★★
Derbyshire | April 2020 Value: ★★★★★☆
★★★★☆ 4.3 out of 5 Service: ★★★★★☆

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

I originally needed to review several company pension schemes I had with a view to the best option for me to either keep them in place or consolidate them.

How has Brian helped you?

Brian spent the time to review the pensions schemes, and based on my personal circumstances advised me of the option he considered best for my future. There was no obligation to follow the advice, but based on our conversations of all the different options, we agreed on a strategy that suited outlook on my future.

Have you seen the outcome you were hoping for?

Yes definitely, I have had an annual reviews and can see the benefits of my choices and the additional funds I now have in my pension pot. Very happy with the current situation, and positive future.

What could they have done better?

Nothing specific really, I have already recommended Brian to my friends and work colleagues.

Read more reviews at

<https://www.vouchedfor.co.uk/financial-advisor-ifa/ilkeston/027647-brian-flindall/reviews>