

Testimonials

Foundation Financial Planning has advised me in so many different areas for many years. They manage my capital, arrange my investment income, submit my Self Assessment return to include my Buy To Let business accounts, arrange mortgage's for me and even make re-claims for trust income paid to my children. Truly an all round service which I am very happy with.

Natasha from Scotland aged 40

Further to an inheritance, I approached Foundation Financial Planning to advise me where best to invest some of my capital as they had already set up my work pension. They made investment recommendations that were coherent with my existing pension investments and that made the most of the tax advantages available to me.

Foundation Financial Planning have also been very helpful with my first house purchase discussing the advantages and disadvantages of different types of mortgage product, and arranged the necessary insurances alongside this in an economical manner.

Foundation Financial Planning have always communicated in a clear and concise way, been transparent about their charges and given me the option of paying via commission or fee.

James from Chislehurst aged 25

I approached Foundation Financial Planning because I wanted to make the best of my work place pension further to some changes being made to it. Through their thorough fact-finding they established that my wife was entitled to a pension benefit previously unknown to her. My wife and I were very impressed with their communication advice and recommendations.

Paul from Hayward's Heath area aged 59

I was referred to Foundation Financial planning by a very good friend of mine and since then they have undertaken many areas of finance for me. These areas include investment planning for income, my personal tax affairs and even my Lasting Powers of Attorney. They regularly update me on the progress of my portfolio, which is very reassuring in these difficult times.

They are patient and clear allowing me to be confident in the arrangements they make on my behalf and their financial recommendations. It never matters who I speak to when I telephone, as they all seem to know what is going on and they are very helpful and patient. Staffs at Foundation Financial Planning are always clear about charges and their fees and I find them very easy to talk to and deal with.

Doreen from Worthing aged 79

The team at Foundation Financial Planning invite me to review on at least an annual basis and continue to make bespoke investment recommendations for my pension that are consistent with my attitude to risk and process any changes in a timely manner. They also made reclaiming my higher rate tax a simple process.

Foundation Financial Planning have made recommendations for my mortgage and insurance needs too and have added value to my circumstances in an economical way. They often present a menu of options along with a primary recommendation and work with me to ensure the best outcome for me. I have always felt they are client centric, clear in their communication, clear about their charges and make themselves available to me even if outside of "office hours"

Gordon from Stanford-Leigh-hope aged 28

My late husband and I contacted Foundation Financial Planning directly as they were a local firm to us. Our circumstances were complex in that we had tax, estate planning and investment issues to deal with. We wanted to arrange our finances in a way that minimized tax for our beneficiaries and us, delivered sensible returns and catered for us in the event of one of us passing. Foundation Financial Planning arranged our affairs in a streamlined reliable way and I have always found them professional and friendly.

Betty from Hayward's Heath aged 72

I approached Foundation Financial Planning for a second opinion on some advice I had received from another advisor. Without attempting to take this business away from the other advisor they assisted me in a greater understanding of my circumstances. As part of their process I was introduced to optimum investment advice techniques and overall transparency.

Further to this process I instructed them on other corporate and personal work and can confirm that Foundation Financial Planning always seek to add value and justify the fees they charge. I have been very satisfied with the way they have handled my account and I feel confident in their abilities. They work as a team with the common objective of delivering the best outcome for me.

Ivan from Hayward's Heath aged 49

I approached Foundation Financial Planning to assist me in maximizing the amount of benefit I could gain from my accrued pension pots.

Foundation Financial Planning discussed the different options with me and made recommendations that best met my objectives. Their recommendation to delay taking benefits until it was more favorable from a tax perspective has been to my advantage and although the process from start to finish has taken over 6 months, the team at Foundation Financial Planning have always responded to my queries in a timely manner and did what they always said they would do and when they said they would do it.

Kathleen from Hayward's heath area aged 65

The team at Foundation Financial Planning has looked after me for many years. They made the best use of my capital through very difficult economic times and converted that capital in the best way to see me into my retirement.

They were helpful, communicative and patient in all financial areas to include my personal tax affairs and continue to be so.

Importantly, they were clear in what was being recommended to me and why. I saw the costs associated with their advice, which were always made clear, as an investment in my financial future.

Ed from Hayward's Heath aged 76

Further to an inheritance we approached Foundation Financial Planning for independent financial advice on how best to integrate this capital. From their company information we gathered their investment and tax approach was holistic, and right from the start we felt the benefit of their methodology. Their method of communication and charges were clear and they delivered on their commitments.

We have been impressed with how they have run our trust fund from an investment return point of view and their ongoing support has been commendable.

Kevin and Lena from Hayward's Heath ages 36 and 42

My son referred me to Foundation Financial Planning (FFP). At the time I was working in a senior position for a blue chip global retailer so my situation was complex I had share options, investment issues, Inheritance tax issues, Estate Planning issues and administrative issues to do with my finances, so I needed an adviser and a firm who could cogently tackle these concerns. I subsequently became a consultant for my ex-employer and FFP continued their service working closely with my accountant. FFP advise my wife and I and our sons, they ensure that as a family our finances are efficient for tax and investment returns.

Dawn and Steven from Cambridge ages 56 & 53

My wife and I approached Foundation Financial Planning (FFP) a few years ago with investment and annuity enquiries. Also, my wife was a beneficiary of a trust and I wanted to discuss subjects to do with this arrangement. Since then FFP have looked after our ISA and other investments with consistent returns and sensible investment strategies. Having looked after my own fixed interest investments for some time I was pleased to see FFP also recommend direct fixed interest investments and had a good understanding of investment trusts, FFP have effectively placed investments in these areas for my wife and I. FFP also now look after the trust that my wife has a beneficial interest in and FFP were influential in keeping this trust alive because they were aware of its importance for the purpose of Inheritance tax.

Anthony from West Sussex aged 83

For the purpose of authenticity we would point out the above client's have signed the above testimonials. Copies of which are held in our office, should they wish to be viewed.