

Client Reviews

Simon Munday

Prosperity IFA



4.7 out of 5

Review from Verified Client

Sussex | May 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Final Salary Pension Transfer.

How did Simon help you?

1) Carried out required analysis of the case to transfer 2) Actioned the transfer to SIPP provider.

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

Yes .. and in the process Simon was constructive, practical and responsive .. very good person to work with.

What could they have done better?

Overall the elapsed time took longer than we were both expecting - so on the basis that time is money - perhaps the review point is how the process can be fast(er) tracked without compromising quality (.. although to be clear I have no direct criticism at all of Simon's urgency, pace or responsiveness

Review from Verified Client

Hertfordshire | March 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Tracking down and securing an aged pension.

Last updated: June 2018

How did Simon help you?

The outcome resulted in an incredibly healthy payday which most certainly would not have been the case if we had not employed Simon's services.

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

Absolutely.

What could they have done better?

I have recently employed Simon on another separate pension issue which again I hope to experience another lucrative conclusion ... which such a large amount of ££££ involved maybe text or email contact on a far regular basis for reassurance

Review from Verified Client

East Sussex | June 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Moving my financial planning/management from a family member .Increasing my income by using investments. Advice on pension.Possible home sale and downsizing.

How did Simon help you?

Simon clearly stated my options in a way that I could understand. He was very sympathetic and patient with a person who was in a vulnerable state.

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

I chose to progress with another IFA, but was very happy with Simons initial meeting and advice.

What could they have done better?

He did an excellent job. It was my personal choice to go elsewhere to an organization that had been recommended by a friend.

Review from Verified Client

East Sussex | September 2015

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement. Advice needed on how to invest several small separate pension funds.

How did Simon help you?

He advised closing the individual pension accounts and to open a single MetLife policy, with a view to having a guaranteed investment income.

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

One year in, there has been a small growth in my initial investment. Costs have been deducted, which are not inconsiderable, but one is informed about these prior to taking out the policy.

What could they have done better?

Simon is very personable. He is willing to take time to discuss options, and has guided me in choosing what I hope is the best policy for me. Only one year in, so it is still early days as far as investment potential is concerned.

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?

growth in investments.

How did Simon help you?

over 3 years our portfolio has increased by over 35%.

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

we are happy to leave our investment in place for a few more years as it is performing so well.

What could they have done better?

generally nothing, we are kept up to date with the portfolios progress on a regular basis and he is always available to answer our questions on it or other queries we may have

Review from Verified Client

East Sussex | August 2015

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

had money from sale of property.

How did Simon help you?

various ways of investing my money.

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

yes i have.

What could they have done better?

no

Review from Verified Client

East Sussex | August 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Value: ★★★★★

Service: ★★★★★

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

Looking for a mortgage on a buy to let property.

How did Simon help you?

He got us a buy to let mortgage.

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

Waiting to exchange contracts on our new buy to let property.

Review from Verified Client

Bridgend | January 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Very proficient and timely. Clear and professional communication at all times.

Review from Verified Client

Herefordshire | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Simon advised myself and my business partner on which cover to take out to safeguard our business, families and each other in the event of illness or death. As co-directors, we rely heavily on one another to run the business, so the insurances and policies Simon advised us on were subsequently taken out after a thorough chat and we left with peace of mind that if the worst should happen to either of us, our families and share of the business would be in safe hands.

Review from Verified Client

East Sussex | December 2014

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Simon is reliable, friendly and easy to talk to. He visits my home which is very helpful to me. His investment advice has given very satisfactory results. If I raise any queries, he deals with them promptly.

What could they have done better?

I have no reason to ask for improvement.

Review from Verified Client

East Sussex | December 2014

★★★★☆ 4 out of 5

Advice: ★★★★★☆

Service: ★★★★★☆

Value: ★★★★★☆

Explained the options available to me so that I could understand it all.

Review from Verified Client

Herefordshire | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Simon has helped me out not only from a business perspective but also on a personal level too. He guided me through the process of setting up the right insurances to safeguard my business and family for the foreseeable future, I felt he was there to offer to advice and not sell me something, which is what I have felt in the past with previous companies. Thanks Simon.

What could they have done better?

This is a hard one, I would say that all effort was put into make sure I was aware of what the policies were and why they would benefit me.

Review from Verified Client

East Sussex | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Simon was really helpful in all aspects of his advice, always explaining each process and pointing us in the right direction of the best products to suit our requirements.

Last updated: June 2018

Review from Verified Client

Kent | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We contacted Simon initially to arrange a mortgage. His advice and knowledge of the market was excellent. He kept us informed of updates and was very pro active. We will be using his services again on future financial planning.

Review from Verified Client

Surrey | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I found Simon to be responsive, friendly, professional and understanding. His advice was clear and Simon was upfront and open with his fees. Ultimately Simon took all the stress out of my having to find a decent mortgage and I am very satisfied with the mortgage and insurance policy he arranged for me.

Review from Verified Client

East Sussex | August 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

He is extremely informative and made sure that I was kept up to date every step of the way.

What could they have done better?

N/A

Review from Verified Client

Kent | August 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

My adviser has always explained things in easy terms that I could understand right from the beginning Always in a friendly manner and has always been at the end of a phone or e mail if I do not understand anything. Has always been up front with how much everything will cost and when it should be paid and to whom

Review from Verified Client

East Sussex | August 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Adviser assisted me in decided on and obtaining best life insurance deal available to me & helped set it up. Absolutely free of charge so extremely good value for money. Adviser kept me informed of progress at all times and ensured that an adviser would contact me in his absence

What could they have done better?

It would have been useful to me to know that the adviser was going away & who to contact. However, his stand in made contact

Review from Verified Client

East Sussex | August 2014

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

His advice is good.

Review from Verified Client

East Sussex | August 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Simon is an excellent communicator and throughout every process we have been through, I felt that I fully understood everything that was being discussed. I would highly recommend Simon and his Company to everyone I know.

What could they have done better?

Nothing

Review from Verified Client

West Sussex | August 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

The investment objectives were complex and Simon took the time to fully understand them. He came up with innovative solutions and was a pleasure to deal with.