Client Testimonial

Q1: How would you describe your Client Centric Wealth adviser?

Client Details	Response
Married Couple Business Owner Term as Client: 6 Years Areas of Advice: Investment / Pension Funding / Business Financial Planning	Vikas is a very helpful and friendly person. 10/10
Married Couple Retired Business Owners Term as Client: 11 Years Areas of Advice: Estate Planning / Investment / Specialist Tax Efficient Investments	We have found Vik to be the impeccable, consummate professional, and a true gentleman. 10/10
Married Couple Retired Executive Term as Client: 10 Years Areas of Advice: Estate Planning / Investment	A very pleasant and agreeable man who is easy to talk to and discuss matters at hand. 8/10
Male Client Barrister Term as Client: 18 Months Areas of Advice: Investment / Pension Funding / Specialist Tax Efficient Investments	Great advice. 10/10
Married Couple Retired Executives Term as Client: 10 Years Areas of Advice: Investment / Pension Funding	We have known Vik for ten years, and we have always found him to be helpful, friendly, and genuinely interested in us as people as well us customers. 9/10
Married Couple Social Worker (Director) and Senior Health Visitor Term as Client: 14 Months Areas of Advice: Investment / Pension Funding & Consolidation	Approachable, friendly and a pleasure to know. 10/10

Married Couple Retired Police Officer & Homemaker Term as Client: 2 Years Areas of Advice: Investment	I have found Vik Sharma to be thoroughly professional, trustworthy and a man of integrity. 10/10
Married Couple Doctor and Financial Director Term as Client: 5 Years Areas of Advice: Investment / Pension Funding	Very competent, knowledgeable, and pleasant personality.
Male Client Business Owner Term as Client: 12 Years Areas of Advice: Investment	I have known Vikas for almost 12 years. When I first met him, he presented himself as caring, honest and was looking towards my welfare rather than his gain. He is a very honest person without any personal motive. He wanted to see me flourish. He was very transparent with the advice he gave me and at all times he kept my interest first. He made me feel warm and earned my trust to work with him. Rating 10/10
Retired Business Owner Term as Client: 2 years Areas of Advice: Investment / Pension Drawdown	I have found Vik Sharma to be honest, helpful and thorough in his dealings with my financial affairs.
Mother and Son Retired Farmer & Accounts Supervisor Term as Client: 10 years Areas of Advice: Investment / Estate Planning	Vik Sharma is always very professional whilst remaining friendly, smart in appearance, an active listener and is very intuitive when realising customer needs.
Married Couple Premier League Football Coach & Exam Invigilator Term as Client: 6 Years Areas of Advice: Investment / Pension Funding	Vik is a person who is both ultimately professional, whilst still being very friendly and completely trustworthy. 10/10
Married Couple Retired Engineer & Retired Beautician Term as Client: 10 years Areas of Advice: Investment / Pension Drawdown	Vik is kind and understanding, he always goes out of his way, we couldn't ask for anyone better.
Female Client Business Owner / Accountant Term as Client: 3 Years Areas of Advice: Pension Contributions & Consolidation	Vik is, of course professional, but is also at ease with others. I believe this to be a much needed trait when dealing with the sensitive and complex issues of financial planning. 10/10

Male Client Retired Engineer Term as Client: 10 years Areas of Advice: Investment / Estate Planning / Retirement Income	Courteous and with a pleasant countenance. 8/10
Male Client Retired Government Officer Term as Client: 10 years Areas of Advice: Investment	Always immaculately dressed, polite, punctual and pleasant (or a phone call with a revisit time). 10/10
Female Client Retired Housewife Term as Client: 10 Years Areas of Advice: Investment / Estate Planning	A pleasant man, always immaculate, very pleasant and invariably punctual. 10/10
Female Client Retired Personal Assistant Term as Client: 11 Years Areas of Advice: Investment / Estate Planning	A man of great integrity who is prepared to go that extra mile to be of service to his clients. It has been a privilege to be associated with him over the years. 10/10