# Client Testimonial

## Q3: How would you describe the customer service you have received to date?

| Client Details | Response |
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| Married Couple<br>Business Owner<br>Term as Client: 6 Years<br>Areas of Advice: Investment / Pension Funding / Business Financial Planning | Excellent customer service and would definitely recommend him to my friends and family. Rating 10/10 |
| Married Couple<br>Retired Business Owners<br>Term as Client: 11 Years<br>Areas of Advice: Estate Planning / Investment / Specialist Tax Efficient Investments | Vik prides himself on his customer service and he has always exceeded our expectations; he has always been available to respond to our queries, and genuinely feels like an extended member of our family. Rating 10/10 |
| Married Couple<br>Retired Executive<br>Term as Client: 10 Years<br>Areas of Advice: Estate Planning / Investment | Very good. Vik always backs up his assurances regarding contact and keeps any promise he may make. Rating 8/10 |
| Male Client<br>Barrister<br>Term as Client: 18 Months<br>Areas of Advice: Investment / Pension Funding / Specialist Tax Efficient Investments | He is very customer friendly. Rating 10/10 |
| Married Couple<br>Retired Executives<br>Term as Client: 10 Years<br>Areas of Advice: Investment / Pension Funding | Vik is good at visiting us regularly, and providing relevant and helpful information in response to sometimes unusual enquiries, which he resources carefully. Rating 9/10 |
| Married Couple<br>Social Worker (Director) and Senior Health Visitor<br>Term as Client: 14 Months<br>Areas of Advice: Investment / Pension Funding & Consolidation | Customer service is excellent, always reliable and responsive to any queries we have. Rating 10/10 |

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| Married Couple<br>Retired Police Officer & Homemaker<br>Term as Client: 2 Years<br>Areas of Advice: Investment | Vik Sharma responds immediately to any issues or clarifications required and can be relied on to keep my wife and I updated at all times. Rating 10/10 |
| Married Couple<br>Doctor and Financial Director<br>Term as Client: 5 Years<br>Areas of Advice: Investment / Pension Funding | Extremely professional, timely, flexible working arrangements. |
| Male Client<br>Business Owner<br>Term as Client: 12 Years<br>Areas of Advice: Investment | As for the Customer Service, he is very informative and transparent. He is always available via social media. Call him at any time and he will respond in no time. In short I have been very happy with his interaction with me. I would not hesitate to recommend him to any potential customer. Rating 10/10 |
| Retired<br>Business Owner<br>Term as Client: 2 years<br>Areas of Advice: Investment / Pension Drawdown | I was more than happy to move back to Vik Sharma once he had started his own company as I knew, have not been disappointed, that he would give me a personal service that I could rely on to be to my best advantage. |
| Mother and Son<br>Retired Farmer & Accounts Supervisor<br>Term as Client: 10 years<br>Areas of Advice: Investment / Estate Planning | The customer service I have received from Vik Sharma is second to none, maintaining appointments, keeping me informed of financial planning progress, and always responding to any query I have. |
| Married Couple<br>Premier League Football Coach & Exam Invigilator<br>Term as Client: 6 Years<br>Areas of Advice: Investment / Pension Funding | The customer service we have received has always been excellent, Vik has always been available for any queries and they have been dealt with straightaway. 10/10 |
| Married Couple<br>Retired Engineer & Retired Beautician<br>Term as Client: 10 years<br>Areas of Advice: Investment / Pension Drawdown | He is professional and extremely approachable, he is a really decent person and has helped us a great deal. |
| Female Client<br>Business Owner / Accountant<br>Term as Client: 3 Years<br>Areas of Advice: Pension Contributions & Consolidation | Vik has a lot of enthusiasm and energy, getting things moving from the start. Vik is devoted to providing you with what you need, when you need it. 10/10 |

Disclaimer: At Client Centric Wealth, we value the feedback and comments from our clients on our service and the advice they receive. We also respectfully value the security and data protection of their personal information which is why we have withheld their full identity on these testimonials. If you would like to find out more about how we gather this information, please email: contact@clientcentricwealth.com.

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| Male Client<br>Retired Engineer<br>Term as Client: 10 years<br>Areas of Advice: Investment / Estate Planning / Retirement Income | Prepared to visit and discuss possible future investments. 8/10 |
| Male Client<br>Retired Government Officer<br>Term as Client: 10 years<br>Areas of Advice: Investment | Since he has set up his own business, he has visited and phoned. I could not have asked for more. 10/10 |
| Female Client<br>Retired Housewife<br>Term as Client: 10 Years<br>Areas of Advice: Investment / Estate Planning | Since he has set up in business, he has dealt with me promptly and efficiently (previously all correspondence came from the company who employed him. 10/10 |
| Female Client<br>Retired Personal Assistant<br>Term as Client: 111 Years<br>Areas of Advice: Investment / Estate Planning | Excellent, keeps in touch with me on a regular basis and is always on hand to deal with any queries or problems I may have. 10/10 |