CLIENTCENTRIC
WEALTH EFFICIENCY SERVICE

Client Testimonial

Q2: How would you describe the financial advice you have received to date?

Client Details	Response
Married Couple Business Owner Term as Client: 6 Years Areas of Advice: Investment / Pension Funding / Business Financial Planning	Always have had sound advice from Vikas. Rating 10/10
Married Couple Retired Business Owners Term as Client: 11 Years Areas of Advice: Estate Planning / Investment / Specialist Tax Efficient Investments	Vik has used his specialist and extensive knowledge of the financial system to successfully advise our family on inheritance tax and estate planning, and investment advice - the like of which is not found on the high Street. Rating 10/10
Married Couple Retired Executive Term as Client: 10 Years Areas of Advice: Estate Planning / Investment	Takes good care in getting to know what risks or otherwise you wish to take and the advice given to date has been to our satisfaction. Rating 8/10
Male Client Barrister Term as Client: 18 Months Areas of Advice: Investment / Pension Funding / Specialist Tax Efficient Investments	He has advised me on Pensions, EISs, and other tax efficient products. Rating 10/10
Married Couple Retired Executives Term as Client: 10 Years Areas of Advice: Investment / Pension Funding	We have been pleased with the financial advice received from Vik, which we believe has been based on a careful analysis of our circumstances and preferences. Rating 9/10
Married Couple Social Worker (Director) and Senior Health Visitor Term as Client: 14 Months Areas of Advice: Investment / Pension Funding & Consolidation	Professional, knowledgeable, very good advice and thorough. Rating 10/10

Married Couple Retired Police Officer & Homemaker Term as Client: 2 Years Areas of Advice: Investment	Vik Sharma has provided comprehensive, impartial and measured financial advice without pressure enabling my wife and I to make an informed choice. Rating 10/10
Married Couple Doctor and Financial Director Term as Client: 5 Years Areas of Advice: Investment / Pension Funding	Very sound financial advice covering wide range of services and products.
Male Client Business Owner Term as Client: 12 Years Areas of Advice: Investment	Excellent. I set my goals and he made me achieve what my targets were. He would tell if it was possible or not. In my case he over exceeded my goals. He is very knowledgeable with current situations and will inform you at all times what the market is doing. He will produce charts and figures which an average person can follow and understand. He is an excellent presenter of the investment portfolio. He made my finance grow. Rating 10/10
Retired Business Owner Term as Client: 2 years Areas of Advice: Investment / Pension Drawdown	When I first met Vik it was not long, after he acquainted himself with my situation, that he explain many aspects of my pension and finances that had not been explained to me previously. In 2 months I had more understanding of my finances than I had in 10 years.
Mother and Son Retired Farmer & Accounts Supervisor Term as Client: 10 years Areas of Advice: Investment / Estate Planning	I have received financial advice from Vik Sharma for nearly 10 years, and of which has been very sound and up to date, constructive and advantageous.
Married Couple Premier League Football Coach & Exam Invigilator Term as Client: 6 Years Areas of Advice: Investment / Pension Funding	The advice we have received has always been considered and tailored to our requirements, we have full confidence in him. 10/10
Married Couple Retired Engineer & Retired Beautician Term as Client: 10 years Areas of Advice: Investment / Pension Drawdown	We have been with him for over 10 years back when my husband had his business. We wouldn't go anywhere else. He is there whenever you need him, and provides the best advice that you can trust.
Female Client Business Owner / Accountant Term as Client: 3 Years Areas of Advice: Pension Contributions & Consolidation	It was refreshing from my first meeting with Vik, through to-date, how much he listened to my input; and then with his extensive knowledge and experience, in the field, matched my needs with the products available – with results that far exceeded my expectations. 10/10

Male Client Retired Engineer Term as Client: 10 years Areas of Advice: Investment / Estate Planning / Retirement Income	Fairly good considering the current financial situation. 8/10
Male Client Retired Government Officer Term as Client: 10 years Areas of Advice: Investment	He takes time to explain thoroughly, to ensure that I understand! The advice over the years has always been sound. 10/10
Female Client Retired Housewife Term as Client: 10 Years Areas of Advice: Investment / Estate Planning	I have been impressed by the advice I have received and always followed it. 10/10
Female Client Retired Personal Assistant Term as Client: 11 Years Areas of Advice: Investment / Estate Planning	Have received very good advice all the years I have dealt with Vik. He has made sure that the investments placed have been tailored to my requirements. 10/10