

Client Reviews

Martin Archdale

MAP Financial Planning Limited



5.0 out of 5

Review from Verified Client

North Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I first met Martin in 2015 when I was going a difficult time financially and needed to organise my finances and plan ahead for myself and my disabled family.

How did Martin help you?

The situation was particularly complex as I'm a single parent of three boys (one disabled) and needed to consider investments and savings accounts which at the time overwhelmed me and Martin guided me through the process very clearly encouraging me to decide the level of risk I was happy with taking etc. I was very confident that Martin had my best interests at heart and devised a bespoke financial plan that I felt comfortable with I had been through a very difficult emotional time but Martin was very calm and thorough and guided me through each step enabling me to feel confident every step of the way

Have you seen the outcome you were hoping for?

Yes! Unfortunately the plan I had intended to follow didn't go quite the way I wanted it to due unforeseen personal circumstances changing dramatically again Martin was there in the crisis guiding me through and adapting a different approach to meet my new financial situation. I will be honest it was the worst time of my life but Martin remained calm, focused and supportive always thinking about my financial situation and the best way forward FOR ME!

What could they have done better?

Martin was excellent throughout and couldn't really have done any more . I have just had my

annual review with Martin and will be moving forward after Covid 19 with a different plan .
Martin is a very personable advisor and is eloquent and clear about his intentions and I
wouldn't hesitate to recommend him to anyone for his expertise !

Review from Verified Client

West Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement planning

How did Martin help you?

Martin arranged to bring my pensions together & he helped me to ensure that all my
finances were in order and that I have a robust plan for the future.

Have you seen the outcome you were hoping for?

I am so happy with the outcome so far and feel confident that Martin will always give me
advice suited to my needs.

What could they have done better?

Happy with everything Martin has done for me.

Review from Verified Client

Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I became self employed after 30 years of employment and therefore needed to review and
organise my Insurance and Pension provisions.

How did Martin help you?

Martin organised all of my requirements in a cost efficient and professional way. Further ,
Martin has ensured that reviews are taken place each year and or when required by myself

Have you seen the outcome you were hoping for?

Yes as expected.

Review from Verified Client

East Riding | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My wife was first to talk to Martin, I heard their conversation and was interested to see how he might help me. I wasn't sure I had enough funds to warrant his involvement. It turned out that he was able to help, from the first meeting.

How did Martin help you?

he invested some money I had in the building society for a greater return, at a risk determined by myself, that is to say, low risk. He also released money from an "opted out" scheme that was not due to pay me until much later in life.

Have you seen the outcome you were hoping for?

Better than I had hoped for, even in these difficult times with Covid19, and world markets being touchy, my investment seems secure and still growing - despite market fluctuations.

What could they have done better?

I am relaxed about where my money is, and I trust Martin to inform me should anything need to change. We see Martin once a year, but I can phone or text him anytime I like. I find it hard to write any constructive criticism, the investment has been well handled. Maybe a personal half yearly phone call to me would have been nice. However, that is a big ask, which bank or building society would do that, and also give the good returns that I have experienced?

Review from Verified Client

Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

After taking early retirement i wanted sound advice to look after and improve my savings

How did Martin help you?

Martin has diversified my savings to get me the best returns on my investment

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Martin has kept me up to speed on how the markets are performing so i cannot find any areas of which he has not given me good advice

Review from Verified Client

West Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I recently (semi) retired and drew my company pension and Lump Sum. Hence I had the lummo sum to invest.

How did Martin help you?

I met with Martin and discussed the options. Martin explained everything to my satisfaction and continually "looks after" my investment in an efficient, professional manner whilst keeping things simple for me.

Have you seen the outcome you were hoping for?

The outcome has exceeded my expectations paricularly considering the challenging times we are currently experiencing.

What could they have done better?

I honestly could not ask any more from Martin. He keeps me informed more than adequately, but not too much.

Review from Verified Client

West Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My company closed their Defined Benefit Pension Scheme and I needed advice on how and where to transfer the pot.

How did Martin help you?

Martin helped to determine the best fund to invest my pension after several meetings to understand my personal circumstances and needs for the immediate / mid and long term future.

Have you seen the outcome you were hoping for?

Yes, in fact significantly more than what I could have hoped for.

What could they have done better?

At this stage I'm not aware of anything that could have been done better.

Review from Verified Client

East Riding | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Company retirement age was 60 but state pension was then deferred until 66. Needed help to organise savings to provide an income in the interim. My husband sought similar advice.

How did Martin help you?

Following an initial phone conversation Martin visited us and the journey began. He took an overview of all our accounts/savings and prepared investment portfolios. With annual reviews, home visits and always available at the end of a phone we have maintained an excellent and friendly working relationship. His 'down to earth' approach is always appreciated and trusted.

Have you seen the outcome you were hoping for?

Our investment expectations have been exceeded. Martin has managed our accounts in the

most professional and efficient way, responding immediately to any queries. He has given us confidence, often in the most volatile situations this year.

What could they have done better?

n/a

Review from Verified Client

South Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had money to invest and wanted an honest personal approach. Someone to give me advice as this was a new area of investment for me.

How did Martin help you?

He advised me to play safe when choosing which areas to invest in, while not putting all my eggs in one basket.

Have you seen the outcome you were hoping for?

I have been very pleased with how my investment has increased over the years.

What could they have done better?

I am very laid back about my investment and don't check what is happening on a regular basis. I have confidence in my financial adviser that he would contact me if he was concerned about my shares. Martin

Review from Verified Client

North Yorkshire | December 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★

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

I retired with a lump sum and obviously wanted to do the best I could with it. I spoke to several advisors and eventually chose Martin.

How did Martin help you?

My lump sum was invested so well that when my wife had to leave her occupation we down-sized our home (the children having left) and invested some of the equity with Martin. That is the only reason my wife and I are both retired. I've just turned sixty and my wife is only fifty!

Have you seen the outcome you were hoping for?

Yes. Better than I expected. It was initially a bit scary with the value of our investments going down as well as up, but Martin was very reassuring and now I have full confidence. The overall growth has been so good we have been able to buy a mobile home. Our retirement is certainly better than we expected!

What could they have done better?

I don't know the ins and outs of what financial advisors do but from an investors view I have no criticisms. If it wasn't for our investments either my wife or I would still be working.

Review from Verified Client

North Yorkshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We had money to invest

How did Martin help you?

He was very patient. Advised us and helped us to do the right investments. Lovely chap

Have you seen the outcome you were hoping for?

Yes thank you

What could they have done better?

We're very happy

Review from Verified Client

North Yorkshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

As I approached early retirement I was in need of some independent financial advice with regard to how best to make sense of the different investment options that were available to me.

How did Martin help you?

Martin is not a salesman in the sense he listens to what your personal and financial objectives are both in the short and long-term. He then takes you through the different investment opportunities and explains why they might be suitable for achieving your personal and financial goals. Martin has a depth of financial knowledge and this is backed up by making sure that every decision is taken in the best interest of the client.

Have you seen the outcome you were hoping for?

I have been with Martin for several years now and despite the impact of Covid-19 on the financial markets I am very satisfied with how my investments have performed.
