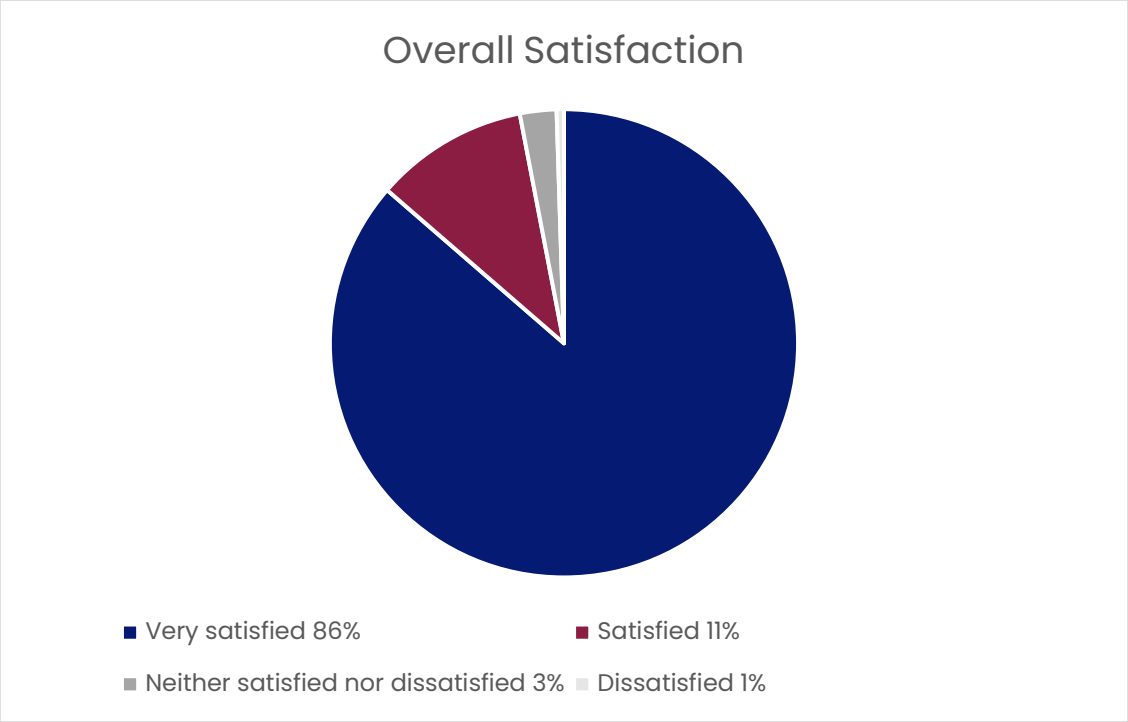
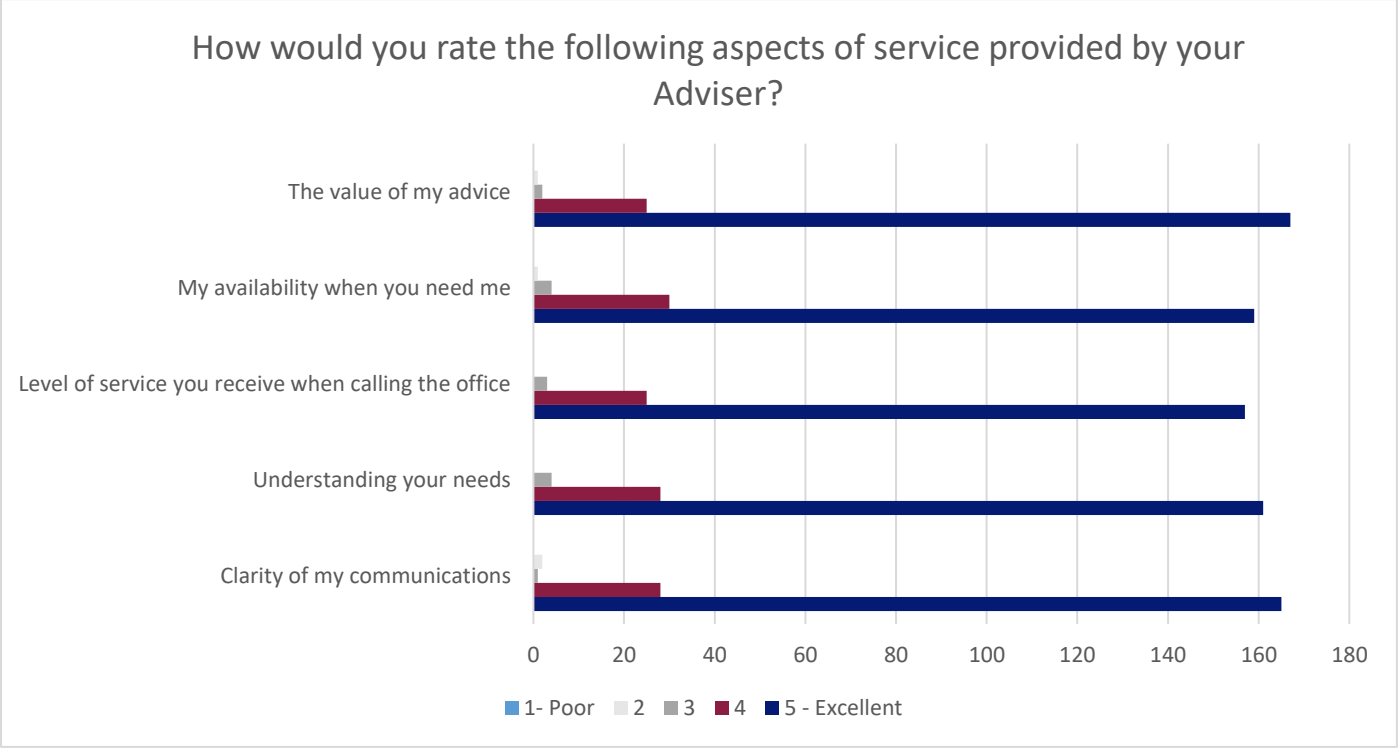
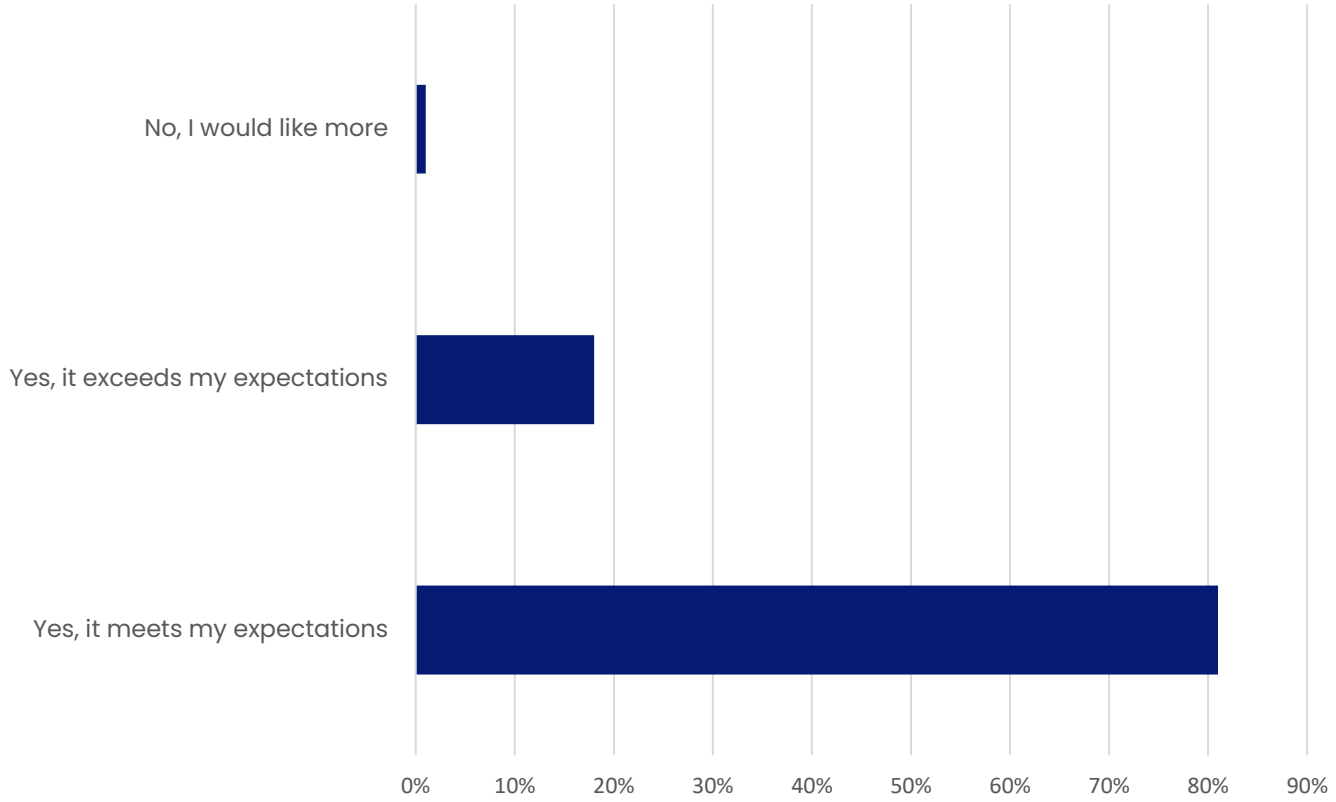
In December 2021, we conducted a client survey to all clients. We had a very positive response, and we are delighted to share some of the key findings with you. These results are based on the 203 respondents who took part.

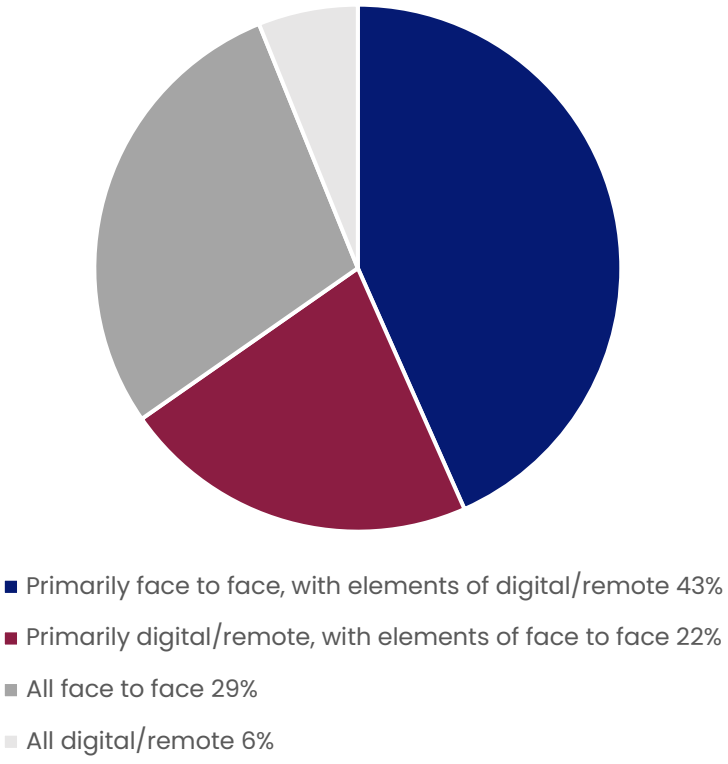




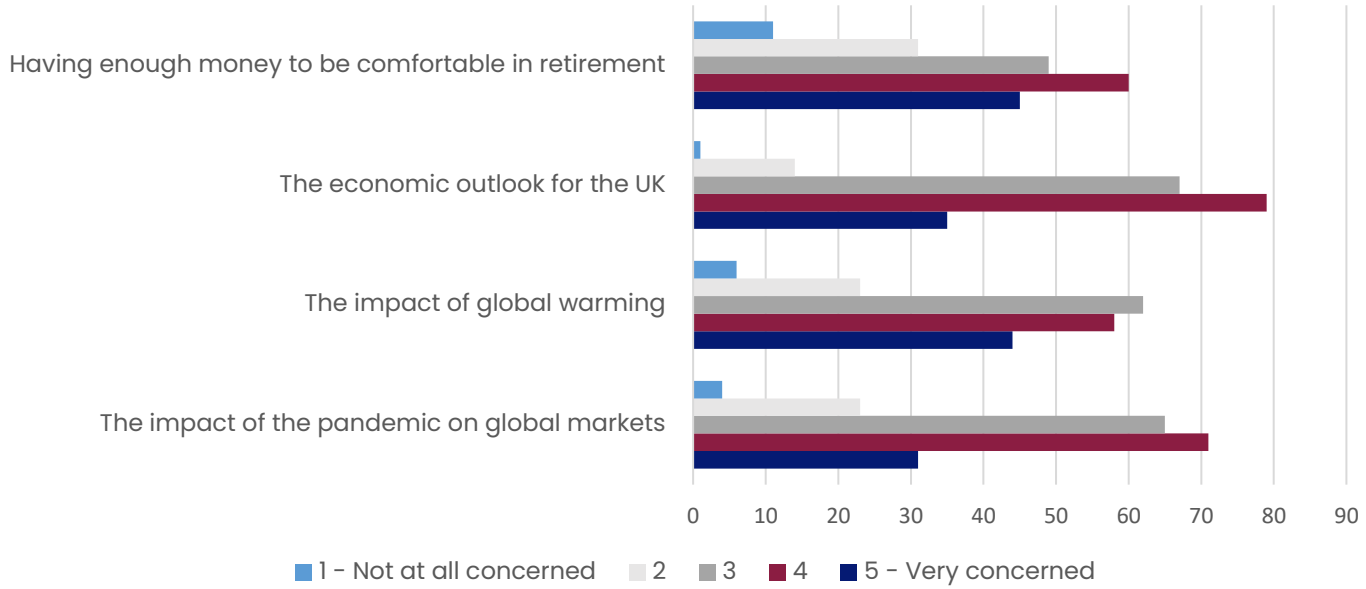
Are you satisfied with the frequency of face-to-face meetings, either in person or digitally?



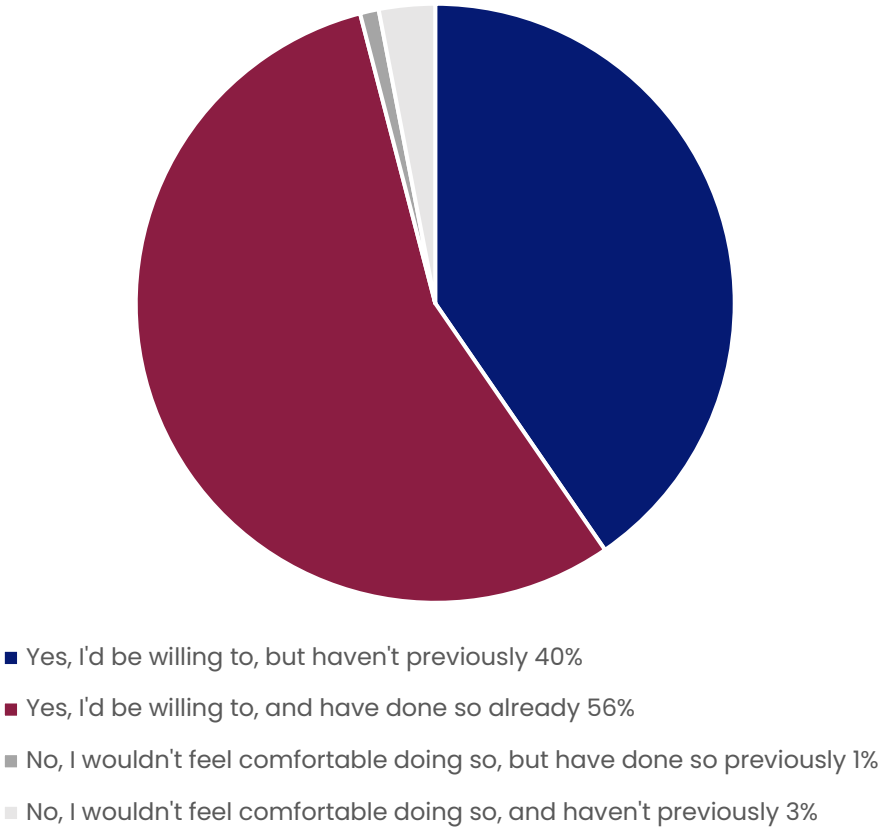
What is your preferred method of interaction?



Thinking about the future, and the potential impact on your future wealth, how concerned are you about the following?



Would you recommend us to others in the future?



Client testimonials

"Highly informative using the information of our current and future requirements. We are completely happy and confident with the service we have received. Sound advice led to sound investments; we have not been disappointed. "
Bryan Hardy

"Excellent, professional and reliable service."
Thomas Armstrong,

"HJP are always polite, helpful and honest. "
Stephen Parrott

"Excellent service, friendly atmosphere. "
Nicola Horton

"I have had good advice and a proactive service delivered in a professional and friendly manner ."
Neil Fallowfield,

"I always feel comfortable that the information I am given is well researched, informative and most of all honest. It gives me confidence moving forward ."
Gerald Morris

"HJP offers both professional and experienced financial advice that takes into account the value of your current personal wealth but also includes considerations for future planning and senior lifestyle."
Mark Robinson

"Through circuitous roots I have now been with HJP for over 25 years, I have always felt confident that my future, as it was then, to how it is now, has been handled always to our advantage. It is good to have this part of my life to be worry free. "
Michael Bausor

"HJP have provided a first-class service for my family and me over many years. I trust them implicitly and have no hesitation in recommending them."
Edward Peck

"I have found the help and financial advice very useful. The investments have been very good and provided a sound base for my retirement. "
John Sandiford

"Not too pushy in that I do not feel pressured into making investment decisions beyond previously agreed parameters. I am however appropriately advised on changing market trends."
Kevin Quinn

“A thoroughly reliable and personal service which has provided valuable advice and investments for me over many years. “
Avril Norris

Gregor Watt, Managing Director and Chartered Financial Planner

“I have known Greg for the past ten years and have always found him extremely knowledgeable and helpful. Our annual review meetings are very instructive, cordial, and relaxed. “
James Grant

“I have benefited from the financial advice given to me by Greg Watt at HJP since before my retirement some 15 years ago. His advice and management of my funds has made a considerable contribution to my financial well-being. Of particular benefit has been his willingness to discuss - on a face-to-face basis - my financial needs and any perceived problem that I have had. “
Alan Eve

“Greg and his team are knowledgeable and responsive and have been proactive and thoughtful in helping me plan for my retirement and my family's financial security.”
Daniel North

“Greg has always listened to my financial concerns and the suggestions that you have made have proved to be the right approach for me at the time. I trust that this will continue. “
Stephen Kirby

Eric George, Director and Chartered Financial Planner

“Eric is always friendly and efficient. Happy to recommend. “
Alison Rogers

“We have every confidence in the advice we receive from Eric George, and appreciate (and enjoy) the opportunity to meet him face-to-face periodically as this so useful in clarifying our pension needs, making it easy to ask questions about anything we need explaining in more detail.”
Annabel Blake

“I suppose, financially, my decision to see Eric at HJP prior to retirement was one of the best I have made.“
Peter Davies

“The service I receive from Eric is exemplary. He always discusses all our alternatives and makes sure we realise the implications of our choices and makes sure we are happy with them.”
Eileen Jeal

"HJP, in particular, Eric George, have been influential in our affairs for many years and we have found their services to be most beneficial."
Charles Wise

"Eric is the most helpful and patient person to interpret the complex minefield of my pension. Very clear and thorough. "
James Coutts

Yvonne Bavin, Director and Financial Adviser

"Yvonne is efficient, professional and also friendly. I feel very comfortable asking questions and she responds quickly to any communications. I fully trust Yvonne to give me sound unbiased, flexible advice regarding my investments. I look forward to our meetings and her positive approach has been very reassuring especially during the pandemic."
Sally Carpenter

"I feel safe with Yvonne and HJP, especially as I am now on my own. "
Elizabeth Armitage

"Having been with Yvonne for a number of years we have every faith in recommending you and your services."
Jennifer Dade

Aneeka Patel, Chartered Financial Planner

"Aneeka has been an amazing support to me and my husband over the years. We feel able to provide candid details of our current situation knowing that Aneeka will always give us the best advice for our circumstances. Thank you for your service."
Samantha Olsson,

Ben Moram, Financial Adviser

"Ben Moran has managed my financial and insurance needs for at least twenty years and I have always trusted his financial advice and recommendations with my pension& life insurances etc. Ben explains any financial plans in an easy to understand format and always highlights the pros & cons to all."
Donald Musson

"We have worked with Ben Moram at HJP for many years now and we both feel safe in the knowledge that he will give us his best advice, as well as showing us how to achieve our financial goals. He has never failed us!"
Jan Smewing

"I have always been very happy with the service and information Ben and HJP have given me, and feel my finances are being well managed for my future."
Chris Doody

"Polite, informative, friendly, Ben explains things very clearly and concisely, communicates well."
Jacqueline Davies

Davy Worsfold, Financial Adviser

"Davy brings a wealth of knowledge and experience to the service he provides and possesses an approachable and friendly manner. He assesses and analyses personal requirements patiently but is in no way 'pushy' and allows freedom for the client to reach his or her own decisions about the final way forward. He is on hand whenever needed and is always ready to explain opportunities or queries as they arise. He provides a service that I can recommend with confidence."
Angus Henderson

Michael Phillips, Chartered Financial Planner

"I am really happy with the service provided. Mike is friendly professional and always gives me great advice. I would recommend him very highly."
Jill Pinner

"I am very satisfied with the way that Michael has managed my pension savings and am confident that he understands my financial position and future requirements. He is always well prepared at our meetings and communicates any advice in a clear and friendly manner."
Martin Burgess

"Mike at HJP works with both my wife and I to give us a clear picture of where we are investing, the benefits, the performance of our investments and crucially gives us an idea of where we are at and what we need to achieve in regard to retirement planning."
Simon Golding

"I depend on Michael's knowledge and advice and feel confident in his planning for my future."
Beverley Evans

"Michael regularly keeps me updated on my investment. He explains my options concisely and honestly. Any communication is swiftly dealt with. His professional knowledge instils me with confidence. I would have no hesitation in recommending Michael."
Beverley Wigby

"A very knowledgeable and easy to talk to adviser, Mike is always available to give expert advice in an easy-to-understand format."
Christopher Westwood

Mark Richings, Financial Adviser

"Mark Richings has been a valued source of information since transferring my savings from an alternative planner who was very much trusted. He is almost always available at short notice and explains in layman's terms if necessary, the complex ins and outs of financial planning. His service has been appreciated enough for him to now handle both my daughter's and best friend's investments. His advice is 100% guaranteed NOT to just be best for himself/his organisation, but what's best for the client and that is invaluable."
Gerald Speechley.

"We value Mark's advice and his expertise, coupled with the backing of the company. It has stood us in good stead over nearly a decade. Thank you, Mark."
Susan O'Neal

"Mark is very knowledgeable, and I trust that my financial health is being well looked after. "
Susan Duncan

"Mark has provided very sound advice for our family over the last 5 years with respect to inheritance tax planning and investment as well as pension planning. We have always followed his recommendations and have benefited from the advice. He is very friendly and approachable and would feel confident to recommend him to any of our friends or relatives."
Christine Heron

"Mark has always been there when needed and I have 100% faith in him to look after my and my friends' investments. I have been with Mark Richings for many years and had no complains. Thank you."
Dilip Trivedi

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