

Client & First Impression Reviews

Chris Dunn

Orridge & Dunn Independent Financial Advice



5.0 out of 5

Review from Verified Client

Gwynedd | June 2024

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

As I approached retirement I needed advice on how to get a trustworthy annuity

How has Chris helped you?

Organised and arranged my annuity

Have you seen the outcome you were hoping for?

yes everything worked well

Review from Verified Client

Derbyshire | August 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed advice regarding the benefits of taking a lump sum from my pension to pay off my mortgage

How has Chris helped you?

Chris listened and responded to my many questions, contacted Prudential on my behalf and provided me with the most detailed information and guidance. He outlined the various options available to me, never made me feel like I was wasting his time with my questions and inspired confidence and belief in a positive future for me.

Have you seen the outcome you were hoping for?

Absolutely - I am now mortgage free which is a life changing experience I never thought would be possible.

What could they have done better?

This service cannot be surpassed - it was absolutely brilliant. I would recommend Chris to anyone. Thank you Chris for your ongoing support.

First impression from a user who is not yet a client

July 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

I had an initial call with Chris to discuss my current pension arrangements and possible changes. I found Chris to be open, honest and down to earth during our discussions. Our conversation has helped me to decide on the best way to proceed.

First impression from a user who is not yet a client

April 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

Great useful advice, open and transparent.

Review from Verified Client

Derbyshire | January 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed advice about transferring a pension into a retirement fund

How has Chris helped you?

He explained my options in a non biased way. Listened to my reasons for the transfer and laid out my options in a clear and concise manner.

Have you seen the outcome you were hoping for?

Yes I am very happy with the outcome

What could they have done better?

Nothing

First impression from a user who is not yet a client

January 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

Just had the first telephone call to talk about my plans and what I'm looking for. Found Chris to be very friendly, helpful and knowledgeable. We will have a face to face meeting when the current lockdown ends.

Review from Verified Client

Derbyshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Mortgage on a new house

How has Chris helped you?

Chris took me through the products available and considered a range of options on how to achieve what I needed. He dealt well with changing circumstances and was courteous and professional throughout.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Viewing this in light of the covid situation and increased remote working, and this may already be happening, can sessions be conducted over facetime/zoom etc.?

Review from Verified Client

Derbyshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To transfer a pension where I could have access to the fund

How has Chris helped you?

He transferred the pension for me

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Derbyshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed a mortgage and then life insurance

How has Chris helped you?

Chris helped us, remotely, to find an appropriate mortgage product and then successfully put together our application and got us an approved offer in principle for our new home. He then assisted us in finding a life insurance policy.

Have you seen the outcome you were hoping for?

Yes, definitely.

What could they have done better?

Nothing.

Review from Verified Client

Derbyshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Expert advise

How has Chris helped you?

Advised me on the products available to me, what made the most financial sense and what evidence I needed to provide

Have you seen the outcome you were hoping for?

Yes- a purchase

What could they have done better?

Nothing

Review from Verified Client

Derbyshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Renewing our mortgage

How has Chris helped you?

Yes

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Derbyshire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I required financial advice with purchasing my first property and was recommended to Chris. I was very impressed with the quick responses and professionalism Chris provides. I would recommend Chris to all. 10/10

How has Chris helped you?

Chris helped me to find the right mortgage for my first property. I have since returned for further information on a future purchase and was very pleased and impressed that he was able to fit us in on short notice and provide excellent advice that has helped me and my partner out a lot.

Have you seen the outcome you were hoping for?

100% - Very knowledgeable, kind and helpful

First impression from a user who is not yet a client

August 2020

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

Chris was very patient as I was unable to communicate by phone for over a week. He has a very pleasant manner and is very articulate about his services. I haven't yet had a face to face

meeting but will be seeing him very soon.

First impression from a user who is not yet a client

July 2020

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

Helpful, relaxed and no pressure. A really affable professional.

Review from Verified Client

Derbyshire | February 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My previous financial advisor retired.

How has Chris helped you?

He took full note of my financial situation and transferred my savings into an investment account that suited my circumstances.

Have you seen the outcome you were hoping for?

Yes, so far my savings are doing well.

What could they have done better?

Chris is very thorough. I don't think he could have done any better.

Review from Verified Client

Derbyshire | January 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We had an investment which required review with a view to maximise return and further cash to invest.

How has Chris helped you?

Chris advised us of how we could switch our existing investment to maximise growth in a tax efficient way and invest our further cash, again to maximise growth, all in accordance with our appetite for risk. We have gone forward with his recommendations.

Have you seen the outcome you were hoping for?

Early days, but so far so good.

What could they have done better?

We don't see how Chris could have done better. He was very thorough in understanding our financial situation and understanding our objectives.

Review from Verified Client

Derbyshire | January 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Redundancy

How has Chris helped you?

Sorted pensions out . Explained everything in Lehman's terms.

Have you seen the outcome you were hoping for?

Yes everything sorted satisfactory.

Review from Verified Client

Derbyshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Annual investment review

How has Chris helped you?

Went through the last year's performance, reviewed my attitude to risk etc

Have you seen the outcome you were hoping for?

Yes, investment performance continues to meet my expectations

What could they have done better?

Nothing

Review from Verified Client

Derbyshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was due to retire and had more than one company pension that i wanted to invest to bring me a regular income.

How has Chris helped you?

He explained what our options were and advised us on the best investment given our circumstances

Have you seen the outcome you were hoping for?

Pretty much, I'm sure everyone would love to see the British economy doing better along with higher investment returns, this is of course out of both my and Chris's control.

What could they have done better?

We are by no means financial experts, Chris explained everything to our satisfaction, with lots of patience and without any pressure. Chris has provided us with rainy day options should the situation occur so we are quit happy to continue using his services.

Review from Verified Client

Derbyshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Re investment

How has Chris helped you?

Clear options and future planningm

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Derbyshire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension transfer and investment advice required

How has Chris helped you?

Explained the process of transferring my pension from the initial provider and the benefits of the plans we decided on.

Have you seen the outcome you were hoping for?

Yes in the sense of the transfer, investment advice is to early to judge.

What could they have done better?

Always professional but friendly and explained every process well, so nothing I can think of.

Review from Verified Client
Derbyshire | September 2019
★★★★★ 5 out of 5

Service: ★★★★★
Advice: ★★★★★
Value: ★★★★★

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

I required advice about the best time to take retirement.

How has Chris helped you?

I had several meetings with Chris prior to making a decision. Chris explained everything throughout the whole process, he puts you at ease and he made it easier for me to make my decision. He gave me good advise and time to consider everything.

Have you seen the outcome you were hoping for?

Yes, took early retirement and not regretted it at all. Still following Chris's advice as it's a big change but no regrets! I have total confidence in Chris and have recommended him to other people.

What could they have done better?

I feel that Chris did everything he could, can't fault him at all.

First impression from a user who is not yet a client

July 2019

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

Very helpful and informative

Review from Verified Client

Derbyshire | June 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was given totally the wrong advice by another pension company, so I looked for a local financial adviser.

How has Chris helped you?

I first spoke to Chris in 2018 about a private pension. A year later when I had received my financial settlement I contacted him again. He still had all the information from our initial conversation.

Have you seen the outcome you were hoping for?

Chris was simply brilliant and advised me all the way through the process. I have total confidence in him and have recommended him to several people.

What could they have done better?

Nothing really, I'm not just saying that, but Chris covered all my questions and concerns and I know if I have any questions I can contact him.

Review from Verified Client

Derbyshire | March 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Buying a house

How has Chris helped you?

Chris was professional and informative, with an indepth market knowledge, making it easy to get the mortgage and life insurance to suit our needs.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Derbyshire | February 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Divorce

How has Chris helped you?

explained everything clearly

Have you seen the outcome you were hoping for?

yes definately

What could they have done better?

nothing

Review from Verified Client

Derbyshire | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were first time buyers and wanted some guidance and expertise to ensure we fully understood the end to end of buying our first home.

How has Chris helped you?

Chris was incredibly helpful and made the whole process not so scary by explaining everything thoroughly. We felt well informed before making any decisions - as a couple that likes to explore all options before making a decision, Chris certainly exceeded our expectations! Safe to say that our mortgage offer was accepted and we are now happily in our first home.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Derbyshire | December 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To consolidate various small pension pots in to the most appropriate investment vehicle, also to get some general advise over some current existing financial pots.

How has Chris helped you?

By advising and explaining on the current various pension pots, what could and couldn't be done with them; assessing my attitude to risk and advising on most appropriate investment plan to move forward with; evaluating my current spend and what I have as excess funds monthly; also estimating what my shortfall in spend would be at retirement based on current annual spend.

Have you seen the outcome you were hoping for?

Yes, though I need to save more!

What could they have done better?

Nothing that I can honestly think of. Chris was thorough in his review, advise and I look forward to meeting him at my annual review. I also feel confident that he will be that any time I need before then.

Review from Verified Client

Derbyshire | December 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension advise

How has Chris helped you?

Had five small pension pots, Chris talked me through different ways to invest for myself, wife and be able to pass any moneys left over to my children.

Have you seen the outcome you were hoping for?

Yes all the plans are now in place and have started to see some growth.

What could they have done better?

Nothing Chris keeps you informed at all times and answers any questions you may have at any time.

Review from Verified Client

Leicestershire | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

House purchase.

How did Chris help you?

Chris helped select an appropriate mortgage taking into consideration my preferences in terms of risk.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Derbyshire | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time home buyer looking for mortgage advice.

How did Chris help you?

He helped explain the mortgages, the options and the whole process very clearly, couldn't have asked for better advice as a first time buyer. I would recommend!.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, the mortgage advised has been ideal for me.

Review from Verified Client

Derbyshire | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I am a first time buyer with previous poor credit history.

How did Chris help you?

In my previous circumstances Chris took the time to look at the situation and give an honest opinion on whether to proceed or to wait, with it being advisable to wait. He didn't charge for this and when the time came for me to be able to attempt a mortgage application he took time to work out the best options. From there he was able to overcome the obstacles that I couldn't.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, I have a standard mortgage so the (relatively cheap) fee has more than paid for itself already.

Review from Verified Client

Derbyshire | August 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

retirement/pension options and advice.

How did Chris help you?

helped me to understand the process and my options going forward.

What is your current situation? Have you seen the outcome you were hoping for?

happy with the recommendations and I believe they were appropriately chosen.

What could they have done better?

I was very happy with the approach the adviser took, and more detail was readily provide on the points I needed clarification on.

Review from Verified Client

Derbyshire | July 2018

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I wanted help to find the best deal possible and discuss different options available to me.

How did Chris help you?

Chris always went out of his way to explain everything in great detail, not question was ever too much and I would have got an very in depth reply.

What is your current situation? Have you seen the outcome you were hoping for?

Yes I the outcome was just what I was looking for!.

What could they have done better?

He was great

Review from Verified Client

Derbyshire | May 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Buying a new house.

How did Chris help you?

Chris was very helpful and informative. He took his time to answer all our questions and left us feeling happy to proceed. He was friendly and professional and answered emails very quickly, keeping us informed through the entire process.

What is your current situation? Have you seen the outcome you were hoping for?

Yes we have.

What could they have done better?

Nothing..very happy

Review from Verified Client

Derbyshire | April 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

complicated remortgage to buy property from a trust.

How did Chris help you?

found mortgage product that exactly suited our needs.

What is your current situation? Have you seen the outcome you were hoping for?

yes.

Review from Verified Client

Derbyshire | March 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Recently set up my own company and wanted to continue with pension contributions.

How did Chris help you?

Looked at my particular circumstances, my retirement requirements and my attitude to risk, then selected the appropriate pension funds that were suitable for me.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, the options he provided were suited to my requirements and i'm very pleased with the pension set up.

What could they have done better?

None.

Review from Verified Client

Nottinghamshire | March 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Having paid off our mortgage we were looking at retirement options and how to ensure we could invest sensibly while at the same time making any tax savings we might be entitled to. We were looking to invest before the end of the tax year and so time was precious. Chris came recommended as he'd helped my parents with their savings and pension and so we did not hesitate in contacting him.

How did Chris help you?

Chris was very accommodating when it came to meeting times, enabling us to meet in the evening when we could get childcare and avoid taking time off from work which was difficult. Chris went through our finances in detail, over an initial meeting and then through two follow-up meetings. He helped us understand our options and recommended ethical investments which we'd expressed were of particular importance to us. Chris diligently documented the outcomes and actions from each meeting almost immediately after each meeting.

What is your current situation? Have you seen the outcome you were hoping for?

We managed to meet the end of tax year deadline we had and Chris recommended a personal pension which met our requirements. The process was quick and Chris's explanations throughout gave us lots of confidence in the outcome.

What could they have done better?

I can't think of anything Chris could have done better.

Review from Verified Client

Nottinghamshire | January 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was nearing retirement with three occupational pensions, I sought advice from Pensionwise with a view to see what was the best course of action, it became clear that I needed financial advice because it was so complicated. My next step was to get a reputable adviser so I went

on vouched for website and found two that had good reviews in my area, after having a meeting with both, my wife and I agreed that Chris Dunn was very professional and thorough in our initial meeting so we chose to deal with him.

How did Chris help you?

We had several meetings with Chris and he painstakingly went through all our income and outgoings and asked us about our aspirations for the future and our attitude to risk, after a lot of hard work on his part he came up with his recommendation as to the best way forward for each of the three pensions. He carefully explained everything to us step by step making sure we understood. He dealt with all three pension companies writing letters, telephoning and sending emails to get everything sorted so that my pensions were working for me. He was available every time I wanted to ask a question, I only had to email and his reply would very quickly come back with everything I needed to know.

What is your current situation? Have you seen the outcome you were hoping for?

It is early days but I am very happy so far, one small pension was cashed in, another slightly larger is now being taken and the largest pension pot was transferred and is being invested, I can check on line at any time how it is doing and I can draw money out if I need it. At present it is doing well and has increased in value more than I would have expected in the short time its has had.

What could they have done better?

I can't think of anything that could have improved the process, it took longer than I thought it would but that is because it was so complicated. My advice to anyone is to start seeking advice well in advance of your retirement date, I am more than happy to recommend Chris Dunn.

Review from Verified Client

Derbyshire | December 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was a first time buyer and wanted some guidance through the help to buy scheme and choosing the right mortgage for me. I also used Chris get home insurance and income protection.

How did Chris help you?

As a first time buyer, I first met Chris to discuss my personal circumstances, salary, savings, and what mortgage I could afford. I was aware of the Help to Buy scheme but didn't know how it would benefit me, which Chris was able to clearly explain. After each meeting, Chris would send me an email summarising what was discussed, further information and what information he required to submit a successful help to buy and eventually a mortgage application. Each step was broken down and clearly explained. If I ever had any queries, Chris was always quick to respond and flexible at short notice if I wanted to meet him. This is one of the main reasons I opted for Chris's services. From start to finish, Chris made what I perceived to be a very complex and daunting process into a straight forward, and stress free experience. As a result, I'm writing this review having just moved into my first home.

What is your current situation? Have you seen the outcome you were hoping for?

Chris has exceeded my expectations by making the process of buying a house a very straight forward and hassle free experience.

What could they have done better?

I genuinely don't think Chris could have done anything more for me. I can't thank him enough!

Review from Verified Client

Derbyshire | November 2017

★★★★★ 442,030,27.08,3.48,74461,453,1,453,0.0,1,1,261,929,9,284,36761,459,1,459,0.0,0

.841,2,5847,182,5,94761,5,1,5,0.0,1,491,1,487,2,348,9,161,447,1,447,0.0,0,2,172,1,5937,813-5,06261,362,1,362,0.0,1,1,541,97,848,5,06261,447,1,447,0.0,0,2,172-1,5939,2,348-9,06261,462,1,462,0.0,1,225,52,19,7612" transform="translate(199,939 0)" fill="#4BC1CA" /> 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had no prior knowledge of how to invest finances.

How did Chris help you?

Chris was very patient and understood our requirements. He gave advice based on the facts and data we presented with options for us to choose. We were not rushed or pressurised and made to feel comfortable and confident that the choices were sound.

What is your current situation? Have you seen the outcome you were hoping for?

It's early days but we have a session planned in a few months to review progress.

What could they have done better?

This was the first time we had made contact with an advisor and Chris fully met what I expected.

Review from Verified Client

Derbyshire | November 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Buying a new property & requiring mortgage & life and critical illness insurance advice.

How did Chris help you?

By recommending the best options for our personal situation for both mortgage and insurance purposes.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, we obtained an excellent mortgage on the best possible rate available to us as he searches the whole market, and we feel reassured with the insurance cover that he also found to fit our needs.

What could they have done better?

We were thoroughly happy with the service provided and the explanations given at each stage throughout the process. Excellent.

Review from Verified Client

Derbyshire | October 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyer.

How did Chris help you?

Chris helped me to search for a mortgage and life & critical illness insurance.

What is your current situation? Have you seen the outcome you were hoping for?

Absolutely.

What could they have done better?

no comments - Chris did a great job and was always quick to respond

Review from Verified Client

Derbyshire | October 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My wife had used the services of Chris Dunn recently with regard to her pension fund and we were very happy with the service provided. I had no hesitation in contacting Chris for advice.

How did Chris help you?

Chris helped me with the transfer of a local government pension fund which.

What is your current situation? Have you seen the outcome you were hoping for?

Yes I have.

What could they have done better?

Nothing the service was excellent

Review from Verified Client

Derbyshire | September 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was going through a separation and needed a mortgage.

How did Chris help you?

He talked me and showed me through all the areas that were relevant to my situation.

What is your current situation? Have you seen the outcome you were hoping for?

I have seen the outcome and very pleased with it.

What could they have done better?

To be perfectly honest Chris was absolutely great, attentive and even emailed me out of hours. I don't think anyone could have done better.

Review from Verified Client

Derbyshire | August 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Recently retired.

How did Chris help you?

Having never had the need to see a financial advisor before, Chris explained about investing thoroughly but in a way that was easy for me to understand, in fact everything he did was pitched just right.

What is your current situation? Have you seen the outcome you were hoping for?

Too soon to answer this but I have received lots of information about my investments and am confident they should do as well as expected.

Review from Verified Client

Derbyshire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Purchasing of a property.

How did Chris help you?

Reviewed financial situation and helped to secure mortgage.

What is your current situation? Have you seen the outcome you were hoping for?

Absolutely.

What could they have done better?

Nothing. I received outstanding service.

Review from Verified Client

Derbyshire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyer looking for mortgage advice.

How did Chris help you?

Chris was super helpful from start to finish and worked around us to fit us in for an appointments. We were first time buyers and had no clue about getting a mortgage and all the things attached to it. Chris answered every question big or small really quickly for us and kept us up to date with everything along the way.

What is your current situation? Have you seen the outcome you were hoping for?

Yes we have now completed on our house purchase and couldn't of done it without the help of Chris.

What could they have done better?

Nothing

Review from Verified Client

Derbyshire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was approaching retirement and needed advice around financial planning and investments.

How did Chris help you?

Chris assisted me in providing comprehensive financial projections based on alternative scenarios mainly involving access dates to my pension, mortgage repayment and investment opportunities .A great deal of care was taken to realistically consider my outgoings but perhaps more importantly how I wanted to live the rest of my life and what then was needed

to be done to aim to meet those wishes.

What is your current situation? Have you seen the outcome you were hoping for?

I am very pleased with the plans we have developed together and I feel far more comfortable in the knowledge Chris has worked with me at every step to hopefully make the right long term financial decisions.

Review from Verified Client

Derbyshire | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Seeking sound advice as to the most efficient way to close a voluntary contributions pension with Prudential and to find the best way to both release funds and to invest the remaining capital in a way that suited my preferences.

How did Chris help you?

Chris put me at ease from minute one by asking simple and precise questions to understand what I was attempting to do. Chris explained things in detail but with little or no financial jargon therefore making things easy for me to comprehend.

What is your current situation? Have you seen the outcome you were hoping for?

Chris's advice and support is very much in line with what I was hoping to do therefore for me it shows that Chris connected with me and my needs and following just 3 meeting Chris has resolved all of my problems and left my finances in a far better position.

What could they have done better?

From the three meetings I've had with Chris I have no issues I'm sure as the relationship builds I will have more opportunity to provide a better view of Chris. To date Chris has met all I require of him

Review from Verified Client

Derbyshire | May 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To get a mortgage.

How did Chris help you?

Found the best mortgage for us and helped with any worries we had.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Derbyshire | April 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed to arrange a mortgage, life insurance, critical illness cover and buildings and contents cover.

How did Chris help you?

Chris found me the most competitive mortgage on the market and guided my partner and I through the process from start to finish from decision in principle to mortgage offer. Chris was able to give advice on which product would suit our specific requirements. Chris's strength is explaining things in simple language which makes the mortgage/insurance concepts easy to understand. Chris proactively followed up with us after our mortgage offer to advise us further on what type of insurance we would need going forward. Again, Chris simplified the process and offered us competitive premiums from reputable firms.

What is your current situation? Have you seen the outcome you were hoping for?

Chris simplified the whole process and saved us hours of time which we would have spent reading, researching, understanding and choosing on our own and has provided us with quality products that our specific to our situation.

Review from Verified Client

Derbyshire | April 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I required personal pension planning advice and investment assistance to make best financial use of severance pay.

How did Chris help you?

Reviewed monthly outgoings and income, assessed attitude to financial risk, researched and down selected two pension providers. Chased up pension provider to ensure investment occurred in tax year 16/17 to support higher tax band refund claim.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

A checklist for required documentation, augmented with lay person summaries, to meet pension rules would have reduced time lost due to multiple requests to existing pension provider statements.

Review from Verified Client

Derbyshire | April 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed independent financial advice in order to transfer a final salary pension.

How did Chris help you?

Chris provided financial advice in a very professional way explaining everything in detail managing my expectations and delivering on every deadline Chris provided an excellent service.

What is your current situation? Have you seen the outcome you were hoping for?

Yes I have had an outcome better than I hoped for.

What could they have done better?

Nothing the service was perfect

Review from Verified Client

Derbyshire | April 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Mortgage advise.

How did Chris help you?

Chris helped me find a mortgage deal with an adverse element on my credit. He spent a significant amount of time researching and personally speaking with his contacts in the industry to get me the best deal possible.

What is your current situation? Have you seen the outcome you were hoping for?

The outcome was far more than I had hoped for. I had been to see other advisors that specialise in adverse credit but felt little to no confidence in the advise I was given. I once had a meeting that took less than 10 minutes. Chris spent time to ensure he secured me the best deal possible and it far surpassed what I had been offered previously.

What could they have done better?

Genuinely, nothing could have been done better.

Review from Verified Client

Derbyshire | March 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We wanted to secure our future and make the most of our money.

How did Chris help you?

The first time he helped us set up an investment scheme which has earned us a 50% increase in what we invested 3 years ago. As we wanted to release some capital we went for a review. He gave great advice on our mortgage position and how to retain some investment in savings. We both feel so much lighter and in control now.

What is your current situation? Have you seen the outcome you were hoping for?

Definitely! We earned 7k in 3 years through the investment Chris set up for us.

Review from Verified Client

Derbyshire | March 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We needed a new mortgage and thought seeing a professional adviser was better than looking on comparison sites.

How did Chris help you?

He gave us realistic, thorough and timely advice on the best mortgages to fit our circumstances.

What is your current situation? Have you seen the outcome you were hoping for?

Yes we received the mortgage we needed.

What could they have done better?

His coffee is a bit strong! :)

Review from Verified Client

Derbyshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was not at all happy with my Financial advisor - I was not convinced he was working in my best interest. Working with Chris this has made be realise I was correct.

How did Chris help you?

I had two issues that I needed advice with - Issue 1 was savings, Chris listened and explained that due to circumstances and timings any benefit that he could provide would be offset by fees and charges. He guided me to a more simple solution. Issue 2 was Life Insurance - I had been working on this with my prior advisor and was not happy with his service, Chris went through my circumstances and although complicated he cut through the issues and guided me to a resolution - we actually amended the original plan I had been working on to better fit my circumstances - in doing so Chris saved me 50% on the monthly premium.

What is your current situation? Have you seen the outcome you were hoping for?

Yes - I got exactly the outcome I was looking for.

What could they have done better?

I honestly cannot think of anything - Chris was calm, measured, straight talking and guided me to a solution that I was very happy with

Review from Verified Client

Derbyshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Remortgage and consolidation of existing bank loan.

How did Chris help you?

Reviewed the market for best available deal to match my current situation. Also contacted life insurance firms to check for suitable life insurance.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, extremely happy with the service provided and the outcome.

What could they have done better?

Nothing, excellent from start to finish.

Review from Verified Client

Derbyshire | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Me and my partner were looking to purchase our first home together and to purchase another property as an investment.

How did Chris help you?

As this was the first time we had looked into getting a mortgage myself and my partner were not at all sure on the process. Chris helped us find the best prices and helped us work out what our financial situation would be like with not only purchasing one, but two properties. He was very helpful with any questions we had and always made time to see us even if that meant working late due to our own working patterns. He made all the information very clear to us, and was always happy to look into things further if we were unsure.

What is your current situation? Have you seen the outcome you were hoping for?

We have now purchased our family home and are now waiting to purchase our second property, which Chris will be helping us with.

What could they have done better?

Nothing, Chris was extremely helpful.

First impression from a user who is not yet a client

February 2017

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

Chris was exactly what I wanted - straight talking, no nonsense advice, very clear on what he thought I needed

Review from Verified Client

Staffordshire | January 2017

★★★★★ 4.7 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★☆

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

Remortgage driven by change in tax relief for mortgage interest on rental properties.

How did Chris help you?

Advised on best options for consolidation of two mortgages into one - confirming tax relief change advice. Surveyed whole market for best mortgage options given agreed constraints and sorted application and completion. Surveyed whole market for life and critical illness insurance and sorted application.

What is your current situation? Have you seen the outcome you were hoping for?

Yes - both remortgage and life/critical illness insurance now sorted. Chris advice and service was excellent; I was sceptical about using a financial adviser but it helped take a lot of the mortgage application frustration away.

What could they have done better?

Not a lot; Chris was excellent, all baring one or two busy periods, his response time was excellent

Review from Verified Client

Derbyshire | December 2016

★★★★★ 5 out of 5

Service: ★★★★★

Value: ★★★★★

Advice: ★★★★★

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

I wanted to take advantage of my young age to start an investment that I could enjoy in the future. My savings were not previously being put to good use.

How did Chris help you?

He explained the investment landscape, my options, the pros and cons, my likely outcome, and

set up my desired plan. He also explained my work pension options and advised on the best plan for me to choose there as well.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, I feel confident with the investment plan we have enacted, my pension choice, and my future finances.

What could they have done better?

Offering later appointment slots to better accommodate my work schedule, that being said I may not have aired this clearly and he was totally fine when I was unfortunately almost twenty minutes late for one appointment.

Review from Verified Client

Derbyshire | December 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My son and I are looking at Property investment opportunities (B2L).

How did Chris help you?

Chris provided excellent guidance and advice including thoughts how we may best approach the challenge of B2L and the risks associated with our project.

What is your current situation? Have you seen the outcome you were hoping for?

We are just starting our Project but would willingly use Chris as our adviser.

What could they have done better?

Nothing more at this stage but we look forward to working with Chris in the future.

Review from Verified Client

Derbyshire | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed advice on merging my pension pots and setting up a SIPP pension navigating the complexity of the pension system.

How did Chris help you?

Explained in as much detail as I required guided me through the various options available allowing me to select what I believed was right for me.

What is your current situation? Have you seen the outcome you were hoping for?

Recomended SIPP pension set up so now getting a monthly income. Ongoing advice available as required. Looking forward to a long and mutually profitable business relationship.

What could they have done better?

Chris was very helpful took the time to explain everything never put under any pressure to make a quick decision so very happy with the outcome

Review from Verified Client

Staffordshire | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

House move.

How did Chris help you?

Chris found us the best mortgage on the market to suit our needs,1st class ,very helpful and thorough ,nothing to much trouble. Will be using Chris again and highly recommend.

What is your current situation? Have you seen the outcome you were hoping for?

All documentation spot on, mortgage accepted and in place for our move.

What could they have done better?

Nothing, every thing Chris did was to the book and spot on/stress free.

Review from Verified Client

| October 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed to arrange a mortgage and had been unsuccessful in the quality of advice from 2 different estate agents. I also needed to arrange life insurance.

How did Chris help you?

Chris was really helpful- from the first moment of answering my call. He was able to arrange an appointment really quickly and gave me an early morning appointment before I started work- which sped things up very quickly. I felt reassured by Chris's approach because he was very straightforward and I didn't feel pressured in to choosing any particular product over another one. He's a very pleasant chap and it was obvious from our meetings- he had a lot of knowledge and contacts in this area- which is invaluable.

What is your current situation? Have you seen the outcome you were hoping for?

Yes- I have secured a really good deal on my mortgage and have a life insurance policy that I'm comfortable with.

What could they have done better?

Everything was fine

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Mortgage application.

How did Chris help you?

He provided some good options to choose from and good, clear information. He was very helpful and quick to respond to communications.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing as far as I can see.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Deciding on a mortgage and buildings, content and life insurance for a new property.

How did Chris help you?

Took all of the time and effort out of selecting a mortgage and insurance policies. Supported us through the entire house purchase process, regularly following up with estate agents, solicitors, lenders and insurers to ensure everything remained on track and clarifying exactly what was needed by us and when.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, we're have a property, mortgage and insurance policies that we're very satisfied with and most importantly, we got there with no stress and without needing to devote a significant amount of time to the process.

What could they have done better?

No, at every stage Chris went over and above to make sure the process flowed as smoothly as possible.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My husband was unsure as to whether it was financially viable for him to take early retirement.

How did Chris help you?

He produced a very extensive report based on the figures we gave him, in very plain English. It was full and comprehensive but easy to understand.

What is your current situation? Have you seen the outcome you were hoping for?

We have.

What could they have done better?

I don't think he could have done any better for us. We are very pleased with the advise and report he produced for us.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

reaching the age of 55 years, having a personal pension wishing to draw 25% tax free lump sum and re invest the remainder.

How did Chris help you?

Chris Dunn, was very knowledgeable, very informative , and very explanatory in all areas of my requirements.

What is your current situation? Have you seen the outcome you were hoping for?

yes, an successful outcome was achieved in all areas of discussion.

What could they have done better?

in my situation , there was not an area, Chris Dunn did not cover very thoroughly and explanatory

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To purchase our family home.

How did Chris help you?

Chris help us a lot in purchasing our home. He make it easier for us to decide what is best and right for us as a first time buyer. Chris simplify everything. Job well done Chris without you i dont know if we manage to get our dream home. Keep up the good work and i will 100% recommend you to all!.

What is your current situation? Have you seen the outcome you were hoping for?

More than what we have expected!!!

Review from Verified Client

Derbyshire | August 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I am purchasing a property and wanted expert advice to locate the best mortgage.

How did Chris help you?

Chris identified the best mortgage for me and ensured that the process has been simple throughout. My first meeting with Chris was in depth and took about 2 hours. He advised me on all the options available to me and even did an affordability check with me to ensure I wasn't overstretching myself. Chris understood totally what I was hoping to achieve and explained everything to me in layman's terms so I fully understood what I needed to do.

What is your current situation? Have you seen the outcome you were hoping for?

Chris found the right mortgage for me which has been accepted. Without Chris' advice I wouldn't have located a mortgage as suitable as the one I have and likely would have paid more.

What could they have done better?

Not from my experience

First impression from a user who is not yet a client

May 2016

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Chris

it was good experience Chris was very informative about the subject gave good advice will use Chris again

Review from Verified Client

Derbyshire | May 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Savings built up over a few years accumulating very little interest in standard savings accounts.

How did Chris help you?

Chris conducted an initial meeting which made it very clear how I can make my savings more profitable in terms of investment opportunities.

What is your current situation? Have you seen the outcome you were hoping for?

It is early as I have only had one meeting however the personable and open style used by Chris gives me great confidence in his abilities to provide sound financial advice.

What could they have done better?

No thoughts on this I felt the opening meeting could not have gone better.

Review from Verified Client

Nottinghamshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We wanted support with every step of getting our first mortgage. We felt a bit out of our depth trying to do this on our depth and wanted the advice of an expert.

How did Chris help you?

Chris was brilliant. Nothing was too much trouble, he answered all our questions and he made us feel very confident throughout the process. Chris always made himself available to see us at short notice and gave us all the time we needed. After meetings with Chris we felt we knew everything we needed to know to make the best informed decision on our mortgage.

What is your current situation? Have you seen the outcome you were hoping for?

Absolutely. We discussed various options in great depth and with great personal consideration. Since agreeing this mortgage we've not had any second thoughts about our decision, things are going well and this is working for us. It's tough as first time buyers and a daunting prospect on your own so Chris's support was invaluable for us. It's great to finally be on the ladder.

Review from Verified Client

Derbyshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Poor credit score.

How did Chris help you?

He enabled me to get a mortgage when others were unable to.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing more Chris could have done this was a 5 star service.

Review from Verified Client

Nottinghamshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Required help with mortgage and insurance advice and cover.

How did Chris help you?

Updated our insurances to provide better coverage for less money and helped me take out my mortgage when moving properties.

What is your current situation? Have you seen the outcome you were hoping for?

Definitely, have all the coverage and mortgage required and the best available rates available for me.

What could they have done better?

Nothing. Great service.

Review from Verified Client

Staffordshire | March 2016

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Chris Dunn approached us, having set up Orridge and Dunn. We had previously had Chris advise us when he was employed by Halifax. Halifax had stopped offering free financial advice.

How did Chris help you?

He discussed our feelings about risk and set up risk profiles for my wife and myself, before suggesting suitable types of investment to fit our needs.

What is your current situation? Have you seen the outcome you were hoping for?

Initially we saw an acceptable increase, but this last year it fell back due to market forces, so following an initial set up fee there is only a small overall gain. We understand that our low risk investments will take time to show benefits.

What could they have done better?

Sorry, but as Chris is good at simplifying matters I cannot see what he could improve on.

Review from Verified Client

Derbyshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were looking to buy our first house and were looking for a mortgage that would suit our needs.

How did Chris help you?

Chris was able to find a mortgage that would fit with what we were looking for. Chris explained to us the different options we had with the amount of money we could put in as a deposit and what that meant to us from a long term perspective.

What is your current situation? Have you seen the outcome you were hoping for?

Unfortunately, both times we approached Chris, the house deal did not go through for different reasons. However, as soon as we find the right house we will be approaching Chris again.

What could they have done better?

No

Review from Verified Client

Derbyshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

In need of mortgage but with poor credit rating.

How did Chris help you?

He found mortgage when two previous advisors could not.

What is your current situation? Have you seen the outcome you were hoping for?

Yes house purchased.

What could they have done better?

Nothing- an excellent service

Review from Verified Client

Derbyshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

needed to get advice on investment of an AVC pension pot.

How did Chris help you?

Everything was explained very clearly, with my advisor sharing with me the computer package which helped to ascertain the risk I was prepared to take with my funds. He explained what an "investment platform" was and how it worked, and helped me to clarify my financial position, making useful recommendations about investments to take me up to state retirement age. His written financial report was very clear and comprehensive. What was really useful is that he made some tax-efficient suggestions that I had not thought of.

What is your current situation? Have you seen the outcome you were hoping for?

Yes. It saved me a lot of time that I would have spent trying to sort things out for myself, without the benefit of my advisor's experience, and his expertise.

What could they have done better?

Nothing comes to mind.

Review from Verified Client

Nottinghamshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

End of my fixed term mortgage.

How did Chris help you?

Chris helped me find a great mortgage rate whilst also reducing my life insurance costs.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, my monthly outgoings reduced by around 15%.

Review from Verified Client

Derbyshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had a number of pensions dotted around and wanted advice as to getting the best out of them.

How did Chris help you?

Chris analysed the pensions and explained to me what my options were. On Chriss advice I moved the pensions into one plan, with lower charges and the option of the new facilities such as drawdown when I come to retire.

What is your current situation? Have you seen the outcome you were hoping for?

I am much happier with things simplified and I look forward to our next meeting.

What could they have done better?

At this point I cannot think of anything that Chris could improve upon.

Review from Verified Client

Derbyshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed specialist income protection and also looking to save money on life insurance.

How did Chris help you?

I was struggling to find income cover due to my occupation and Chris found me a policy with a specialist provider plus also found me cheaper life and critical illness insurance.

What is your current situation? Have you seen the outcome you were hoping for?

Yes very happy.

What could they have done better?

Nothing

Review from Verified Client

Derbyshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Chris has looked after my pension and investment portfolio for a number of years now.

How did Chris help you?

Chris is someone who delivers what he promises. He is always pleasant, knows his stuff, and puts me at ease hence why I continue to use his services.

What is your current situation? Have you seen the outcome you were hoping for?

My portfolio continues to perform consistently and I feel very comfortable with Chris at the helm.

Review from Verified Client

Staffordshire | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was moving to a new property and needed help selecting the right mortgage and advice on adequately updating my income protection and insurances.

How did Chris help you?

My mortgage search was quite a complicated one for a number of reasons not least being self employed. Chris spent the time to understand my circumstances and clearly explained the options available to me at every step. Chris was always available to answer my questions and dealt with everything in a very professional manner.

What is your current situation? Have you seen the outcome you were hoping for?

I was very happy with the advice I was given and feel that Chris's knowledge of the industry helped to get me the best mortgage and insurance policies available to me. This definitely helped to save me some money but also gave me peace of mind that my insurance policies were right for me and covered everything I was looking for.

Review from Verified Client

Derbyshire | December 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Finding a mortgage for a new house.

How did Chris help you?

Helped explain how mortgages work and helped to find the right mortgage for us for the purchase of our first house.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, we have bought a house and we are happy with the mortgage that we have chosen.

What could they have done better?

Nothing.

Review from Verified Client

Derbyshire | December 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Single mum to three small children on income support. Needed to remortgage in my own name due to divorce, however as I have no 'real' job or 'income' banks and other mortgage advisors refused to even look at my case (despite having never missed a payment in two years).

How did Chris help you?

Chris not only took my case, he also found a company that I could remortgage with and gave me excellent advice throughout the process.

What is your current situation? Have you seen the outcome you were hoping for?

I now have a three year mortgage in my own name.

What could they have done better?

offered chocolates as well as jelly beans in the office?!?!

Review from Verified Client

Derbyshire | December 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Re mortgaging due to moving house.

How did Chris help you?

Chris was very helpful in finding us the right mortgage.

What is your current situation? Have you seen the outcome you were hoping for?

Still on the same fixed mortgage deal but will be looking to use Chris again in the future.

What could they have done better?

Everything went smoothly so can't think of anything from our point of view!

Review from Verified Client

Derbyshire | December 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were looking to review our current mortgage as we were considering moving house. We wanted an independent, expert view of the market.

How did Chris help you?

He helped us assess our current mortgage and what our current borrowing limit would be. He then went on to make a full, independent assessment of the market and presented us with various options. With his expert guidance we were able to make our decision on which mortgage product we would use and how much we were able to borrow with a view to moving.

What is your current situation? Have you seen the outcome you were hoping for?

We have now moved property. Moving house was a long and drawn out process and Chris supported us throughout.

What could they have done better?

I don't believe he could have done anything better. The only issue we crossed was with the actual mortgage company themselves but this was out of the hands of our advisor and he helped us rectify the situation.

Review from Verified Client

Derbyshire | November 2015

★★★★★ 5 out of 5

Value: ★★★★★

Service: ★★★★★

Advice: ★★★★★

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

Required a first time mortgage.

How did Chris help you?

Found a mortgage with a good rate of interest and helped with troubleshooting the application to make it go through successfully.

What is your current situation? Have you seen the outcome you were hoping for?

Succeeded in applying for the mortgage and subsequently bought my first house.

What could they have done better?

N/A

Review from Verified Client

Derbyshire | November 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyer looking for a mortgage.

How did Chris help you?

Found us the best mortgage and arranged everything for us including our life and critical illness insurance.

What is your current situation? Have you seen the outcome you were hoping for?

We have been happy with the service and used Chris again when our fixed rate was up to find the best deal.

What could they have done better?

We have been happy with the service and used Chris again when our fixed rate was up to find the best deal.

Review from Verified Client

Derbyshire | November 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I am approaching retirement and needed clarification on all the options that are going to be available to me what with all the changes to pensions that have occurred recently.

How did Chris help you?

I had a free initial meeting with Chris where he explained all the changes to pensions and the options such as annuities and drawdown to me very clearly and concisely.

What is your current situation? Have you seen the outcome you were hoping for?

I am intending to retire next year and am now armed with lots of information to consider between now and then. I shall be returning to see Chris to carry through my plans.

What could they have done better?

So far so good

Review from Verified Client

Derbyshire | November 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I have used Chris for around 10 years and have followed him back from when he worked at CIS. Initially I had a lump sum to invest and have since set up a pension as well as various insurances.

How did Chris help you?

The returns on my investments have been way in excess of what I could have achieved myself through normal bank savings accounts and the like.

What is your current situation? Have you seen the outcome you were hoping for?

Investments and pension performing very well, I have regular reviews with Chris who is always contactable and approachable.

What could they have done better?

Nothing, have always been and continue to be very happy with Chris and would recommend him to anyone.

Review from Verified Client

Nottinghamshire | November 2015

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension and savings review.

How did Chris help you?

By sorting all of my finances and clarifying my pension / savings position.

What is your current situation? Have you seen the outcome you were hoping for?

I am planning to work less than 4 days a week and to retire early. Chris is helping me to do so.

What could they have done better?

Cost could be less

Review from Verified Client

Nottinghamshire | November 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had shares ISA with Halifax where Chris was my financial advisor, I was disappointed that Halifax dispensed with providing the service. A year after Chris left Halifax he contacted me with the offer of his services, I had no hesitation in accepting. Chris has a wealth of knowledge on the subject of the services he provides. and he understands my humour.

How did Chris help you?

Transfer of funds from halifax accounts to more lucrative investments.

What is your current situation? Have you seen the outcome you were hoping for?

The results have been brilliant apart from the China incident.

What could they have done better?

I have not experienced any lacking in The service I recieve on a proffesional level. If I do have a criticism Chris will be the first to know.

Review from Verified Client

Derbyshire | October 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Applying for a mortgage.

How did Chris help you?

Help us find some one that would take on a person over 70 years of age.

What is your current situation? Have you seen the outcome you were hoping for?

Yes and very happy with the out come.

What could they have done better?

Nothing very satisfied with his help

Review from Verified Client

Derbyshire | October 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking into buying my first property and not knowing much about what to do and how to go about it.

How did Chris help you?

He simplified all the complicated aspects of trying to purchase a property. He also helped

explain what was needed and what needed to be done.

What is your current situation? Have you seen the outcome you were hoping for?

I purchased my first property with the help of Chris. Sorting out a mortgage, life insurance and building and contents insurance. Yes I'm extremely happy with the outcome.

What could they have done better?

I was very happy with everything he did. He made me feel very welcome and didn't judge me for anything I didn't understand.

Review from Verified Client

Derbyshire | October 2015

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were first time buyers and we had very little credit history, which made it difficult to get a mortgage from any high street bank. We looked for different financial advisers and Chris was the most responsive one.

How did Chris help you?

He managed to get us a mortgage with a specialist mortgage provider that otherwise we wouldn't been able to get.

What is your current situation? Have you seen the outcome you were hoping for?

We managed to get the required mortgage for our first home and thanks to that we're currently living on our own house.

Read more reviews at

<https://www.vouchedfor.co.uk/financial-advisor-ifa/derby/026189-chris-dunn/reviews>