

Client Reviews

Samuel Dearnley

Iona Beesly Associates LTD



4.9 out of 5

Review from Verified Client

West Sussex | July 2017

★★★★★ 5 out of 5

Service: ★★★★★

Value: ★★★★★

Advice: ★★★★★

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

I wanted to invest in ethical funds.

How did Samuel help you?

Samuel suggested different ways of investing my stocks & shares ISA and pension. One option was to switch to alternative products with the same providers, and another was to migrate to different providers. We also discussed my attitude to risks involved, the merits of various ethical funds, and the sorts of things I would like to invest in. Samuel is a very nice chap: he's very down to earth and he listens well. I felt confident he was looking out for my interests.

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

I'm very pleased with the outcome: I think I'm investing in a good spread of ethical funds.

Review from Verified Client

West Sussex | December 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Required advice regarding eight different pensions.

How did Samuel help you?

Sam listened, understood and explained our options in a clear and concise way. All questions were answered fully.

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

Absolutely, the hope was to provide the best pension for our needs and this has been achieved.

What could they have done better?

Perfect service

Review from Verified Client

East Sussex | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Profit from the sale of my house in London when I moved to Hove.

How did Samuel help you?

Samuel understood my needs clearly and gave me excellent advice as to the actions I should take, i.e. to do all the necessary repairs of my house.

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

The initial advice was perfect for my needs and has given me great satisfaction. The investment plans were carefully explained and Samuel worked hard to re-arrange my existing portfolio.

What could they have done better?

I can't think of anything that could have been done differently at this stage.

Review from Verified Client

West Sussex | October 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Seaking advise about my company pension.

How did Samuel help you?

Looked into my company pension for me and gave me excellent advise on my pension which has put my mind at ease and given me sound advise for how to plan for the future.

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

Samuel has given me a real plan to help me in the future with my pension.

What could they have done better?

Samuel was fantastic and very honest and I will trust him in the future with ideas about how to improve my monies at a later time in life

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 am a single mature lady who wanted professional advice for existing pensions and future retirement. I wanted to establish a connection with a professional, albeit at the advice of friends who suggested I could get such advice from the internet!.

How did Samuel help you?

Samuel provided what I call 'good old customer service'. Formal and pleasant without modern day euphemisms used as a way of communication. Samuel was prompt and efficient in all communications with me and my existing pension company providers. Samuel's communications to me were lengthy but comprehensive and transparent.

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

Samuel led me to the outcome I had not dreamed of hoping for in that he added to my pension pot for the future.

What could they have done better?

There is nothing that Samuel Dearnley could have done better in my opinion. On every level, from trust, communication, feedback and outcome, Samuel was excellent in his approach at every stage. I have much encounters with so called professionals over the years with regard to investments, mortgages, savings and so on; but I must say that Samuel has gained my trust in such an unforgiving society in terms of consumer experiences and associated rip offs.

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 invest the proceeds from a property sale for my old age.

How did Samuel help you?

I first did business with Iona Beesly Associates many years ago, and went straight to her son, Samuel Dearnley, who met me on several occasions to help me understand the different forms of investment open to me. At all times he was extremely polite, giving me comprehensive advice in a very professional manner, taking his time to ensure that I understood in layman's terms, the various investigations he had done on my behalf, and after each meeting, I received confirmations in writing setting out what had been discussed each day, giving me the time to make my own decisions. I was given clear information on all costs and fees involved. I found the whole experience very comprehensive, thorough in every detail, and would highly recommend Samuel as an excellent private IFA.

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

Yes, after every possible option discussed, I have been able to make my decisions with no doubts at all.

What could they have done better?

Samuel went out of way to look after me, I really could not have found any constructive suggestions, I hold comprehensive records of all our discussions and meetings held with him.

Review from Verified Client

West Sussex | August 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking to retire early.

How did Samuel help you?

Samuel gave us all of the options available and fully understood our concerns. The speed with which he dealt with the paperwork was excellent.

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

I am now able to retire a year early and can relax as everything is now in place to enable us to move forward.

Review from Verified Client

West Sussex | July 2016

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I required advice regarding my pension, and guidance through the procedure to release the tax free portion.

How did Samuel help you?

He explained the way forward in a way that I could understand and helped me through step by step.

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

Yes, absolutely..

Review from Verified Client

West Sussex | June 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Decided to retire early.

How did Samuel help you?

He completed a comprehensive review of all the schemes that I was making contributions to and provided a thorough and easily understood summary of all the available options.

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

I am extremely pleased with the terms of the annuities and the timescale for setting them up.

Review from Verified Client

West Sussex | May 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Presently taking steps to a divorce procedure and needed assistance to appraise my financial situation both present and future.

How did Samuel help you?

Samuel listened carefully, asked pertinent questions and gave helpful advice. The meeting has given me confidence to make informed decisions.

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

Yes at this early stage my initial meeting with Samuel has clarified my understanding of my position and I am happy to return at a later stage for more detailed advice.

Review from Verified Client

Surrey | March 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed to review my current life insurance policy as I had concerns over the company I was using.

How did Samuel help you?

He was very thorough and gave me lots of different quotes so that I could consider my options.

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

Yes I have been able to review and take out a new policy which Sam organised for me. The process was very straight forward.

Review from Verified Client

Surrey | February 2016

★★★★☆ 4 out of 5

Advice: ★★★★★

Value: ★★★★★

Service: ★★★★★

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

As part of a fuller review of family finances (arranged by my wife) Sam took the time to review my life insurance policies.

How did Samuel help you?

Having discussed and understood the situation Sam came back with a number of suitable options. Thanks to Sam's efforts I was able to close down a policy with a company I was not happy with and able to take out far better cover with a more reputable organisation and thereby bringing security and reassurance to my wife and family should anything happen to me.

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

Yes.

Review from Verified Client

East Sussex | January 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

The sale of my house in London and my move to Hove.

How did Samuel help you?

Samuel spent time to understand my needs and presented me with a comprehensive report listing my options. He explained these to me with time and patience. The conclusion we arrived at, with his advice, was the most suitable to my present circumstances. I am very grateful for his perceptiveness.

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

I am happy with the recommendations so far. As this negotiation is at an early stage, I hope to continue with Samuel's ongoing advice .

Review from Verified Client

West Sussex | October 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

The death of my husband, who had hitherto dealt with all our financial matters.

How did Samuel help you?

I have been using Samuel Dearnley and Iona Beesley for 4 years now, with all aspects of my financial affairs. Samuel helped me last year with the decision as to how to take my company pensions, looking at all aspects to find the best to suit my circumstances.

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

I now have a stable income and safe investments which thus far have continued to grow.

What could they have done better?

I feel my IFA has done everything I have asked for. He is always approachable and will help at all times.

Review from Verified Client

West Sussex | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed help in deciding how to re invest.

How did Samuel help you?

He was very professional and personable. Also very patient which made me feel at ease.

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

I am very pleased with how he has helped me in a mine field of choice.

Review from Verified Client

West Sussex | August 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Coming up for retirement and needed to gather several small pension funds under one umbrella.

How did Samuel help you?

Considered my current and future requirements and advised on a fund that was not too adventurous i.e. one that I would be comfortable with and at the same time having good return on my money. Samuel arranged and coordinated everything on my behalf, keeping me informed every step of the way.

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

Now retired and all pensions reinvested in one fund and looking forward to the returns.

Review from Verified Client

West Sussex | August 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To access tax free lump sum from pension and close small one.To re-invest in Flexible Draw Down.

How did Samuel help you?

He was very thorough in getting me exactly what I wanted, with minimum fuss and kept me informed at all times.

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

Everything has been sorted to my satisfaction, moneys paid into my bank account and others re-invested.

What could they have done better?

I can not think of any part of this service from initial phone call to end that could have been better.

Review from Verified Client

West Sussex | August 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking to release some pension funds.

How did Samuel help you?

Samuel Dearnley evaluated my position and reorganised my pensions to get the funds required.

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

I achieved the outcome I was looking for.

What could they have done better?

Samuel could not have done more for me, he was very efficient

Review from Verified Client

East Sussex | July 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I became a mother for the first time and recently moved home so I wanted to make sure that I had the adequate insurance in place for my new daughter, my partner and also my new home.

How did Samuel help you?

Samuel Dearnley was fantastic. He provided me with a variety of insurance quotes for my specific situation. He offered me excellent advice and was always at the end of the phone to answer my queries. He is a fantastic financial advisor who also has brilliant people skills and made me feel totally at ease and explained everything so clearly.

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

I am very pleased with the insurance that Sam set up for me. I understand exactly what is in place for me and my family and I am confident that my daughter, myself and my partner are fully protected should we need to be.

What could they have done better?

Nothing. Sam was brilliant from start to finish. I highly recommend him and will certainly use his services again.

Review from Verified Client

West Sussex | July 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Under the new pension rules I was looking to crystallise a small pension and draw down a small amount.

How did Samuel help you?

First, out of working hours he came to my home and talked through all options and looked at all other pension funds I held to make sure any decision made did not affect my retirement funds.

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

Everything has gone through, I've had my tax free allowance and made a small draw down from the remaining amount.

What could they have done better?

From my point of view, nothing. He also followed up with extra advise and sites for me to get in touch with HMRC and to let other pensions I hold know of my crystallisation.

Review from Verified Client

London | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Sam recently provided me with advice on my life insurance protection. He listened to my needs and took the time to talk me through all of the options available to me in clear and easy to understand language. I was very happy with the service I received.

What could they have done better?

Advice was spot-on. No complaints.

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Samuel has looked after my investments for some years now and understands my attitude to risk. He makes sure I grasp all his recommendations before any action is taken. He is courteous and polite and easy to talk to, following up each conversation with a letter of confirmation.

Review from Verified Client

West Sussex | February 2015

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Sam Explains each detail of financial advice I ask for in layman terms that are easily understood He knows my attitude to risks and advises accordingly

What could they have done better?

Nothing immediately comes to mind

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Sam has advised us for a number of years. He has arranged investments for us & is always able to explain every thing in easy to understand language.

What could they have done better?

As far as we are concerned we are satisfied with the actions that have been taken

Review from Verified Client

West Sussex | February 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Excellent thorough,efficient and comprehensive service. I would highly recommend Sam Dearnley for all financial advice.

Review from Verified Client

East Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Liaised with us at every point, even though we are not based in the UK. Went to great lengths to offer us various options pertaining to our situation.

What could they have done better?

Couldn't improve on the service provided

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We have been clients of Iona Beesly Associates Ltd for over 10 years and have found Samuel Dearnley and previously Iona Beesly to be very knowledgeable and helpful in dealing with our investments & pensions. If we have any queries or questions Samuel is only too please to help and give advice.

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Samuel has researched into my paid up pension plans and advised me accordingly. He was very professional, did not limit his time to helping me and explained everything so that it was easily understandable.

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mr Dearnley gave me excellent advice which was delivered professionally, with all fees explained up front. He understood my situation and worked hard to find me my best options. He was also patient and kind when I was being a bit slow on the uptake. He always made sure that I understood all the ramifications. I am pleased that I used him.

Review from Verified Client

West Sussex | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Samuel was very detailed when going through advise relating to the pension scheme I have taken out.

Review from Verified Client

West Sussex | November 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Explains each detail of financial advice I ask for, or he is given me, in layman terms that I can understand. As I have stated he knows my attitude to risks but with any new investment inquiry, I still have the option to change the risk assessment

What could they have done better?

Can not think of any

Review from Verified Client

West Sussex | February 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I was recently diagnosed with terminal cancer, and I contacted Mr Dearnley to help me with my estate planning. He was very easy to talk to, and very thorough, proactive, professional and diligent. He researched in to several frozen pension funds, one of which I had lost track of years ago as it had been taken over by a different company, and had been assigned a new policy number. I was able to claim whole-life payments from these pensions which has allowed me to pay off my mortgage and provide a significant legacy for my wife. He also advised on benefits which could be available to me, and to my wife after my death. Through a sister company he arranged for our wills to be written - again a thorough and professional job. I have used IFAs on two occasions in the past,

What could they have done better?

Couldn't fault the service I received.

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Sam is very personable, efficient and professional. He always provides a very thorough and understandable explanation of matters. Based on my dealings with him I would not hesitate to recommend his services to anyone.

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Samuel helped us with our wills, life insurance and pensions. He is extremely knowledgeable

and offers excellent advice ensuring we were fully aware of all of our options.

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Samuel assisted me and my partner with life insurance, he was very professional and offered excellent advice and really helped us understand everything there was to know about all aspects of the insurance. I couldn't him recommend highly enough, a real pleasure to deal with. thank you

Review from Verified Client

West Sussex | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Always responds to any enquiries we might have.

What could they have done better?

We think he suits are needs well.