

GREG NEALL

Background report to support
inclusion in the **2019 Guide To The
UK's Top Rated Financial Advisers**



Greg Neall

Wake up your Wealth LLP

 Top Rated 2019

4.6 / 5  32 reviews

VouchedFor checks:

 FCA Regulated







 Recent Client Reviews

 Independent Financial Adviser

 Qualifications Uploaded

 Transparent Fees

Services offered

-  Insurance & Protection
-  Pensions
-  Retirement income (annuities, drawdown)
-  Investments and Savings
-  Occupational Pension Transfers
-  Inheritance Planning
-  Long Term Care

Qualifications listed

Advanced Qualifications: 1 Qualification
CII - Chartered Financial Planner

Client Reviews

Greg Neall

Wake up your Wealth



4.6 out of 5

Review from Verified Client

Middlesex | December 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension advice

How did Greg help you?

He advised and helped to move the pensions which gave better returns.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing really as he's been in touch regularly.

Review from Verified Client

Hertfordshire | December 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My income increased significantly and I bought a property so I needed to sort out critical illness, income protection and life cover

How did Greg help you?

Greg and his team were able to sort out all the cover I required. It was so quick and easy. They are always on hand as and when I have questions.

Have you seen the outcome you were hoping for?

Yes I have

Review from Verified Client

Surrey | December 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Transfer of my final salary pension to a managed pension.

How did Greg help you?

Comprehensive advice without emotion - looking at all pros and cons without any pressure.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Even more commentary on future prospects for investments against economic and political upheaval.

Review from Verified Client

West Midlands | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed advice on how to arrange my multiple pension pots

How did Greg help you?

Greg looked at all my circumstances, gathered all the necessary information from the pension providers, really took time to understand my objectives for retirement before

recommending a way forward, and then took care of all the necessary paperwork. He explained all the options and trade-off in depth to make sure I made the right decision, and challenged my initial thinking.

Have you seen the outcome you were hoping for?

Yes. Thanks to Greg's advice, I did not pounce on a large transfer value and make a mistake I may have regretted later in life. I now have a more consolidated pension provision, but one which best meets my reliance on the income and my need for a degree of flexibility.

What could they have done better?

Nothing. I was really very satisfied with Greg's advice and the service he provided, and would be happy to recommend him.

Review from Verified Client

Surrey | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I received an inheritance for which I needed advice.

How did Greg help you?

He gave me advice regarding investment planning.

Have you seen the outcome you were hoping for?

Yes I feel confident that my money is in the best place for my circumstances.

What could they have done better?

I do not think that Greg could have done anything better - a great service.

Review from Verified Client

Buckinghamshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension transfer from final salary scheme.

How did Greg help you?

Helpful explanations and advice and completed the process against tight deadlines

Have you seen the outcome you were hoping for?

All worked out smoothly.

Review from Verified Client

Outside UK | November 2018

★ ★ ★ ☆ ☆ 3.3 out of 5

Advice: ★ ★ ★ ☆ ☆

Service: ★ ★ ★ ★ ☆

Value: ★ ★ ★ ☆ ☆

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

Retirement, sale of property and re-purchase of property.

How did Greg help you?

Advice on investment of my savings portfolio and choice of method of income withdrawal from it.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Responsiveness to correspondence is not always as quick as I would like, but allowances need to be made for the fact that Greg has a small team at his disposal.

Review from Verified Client

Warwickshire | November 2018

★ ★ ★ ★ ★ 5 out of 5

Advice: ★ ★ ★ ★ ★

Service: ★ ★ ★ ★ ★

Value: ★ ★ ★ ★ ★

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

I had an old DB pension scheme from a previous employer and wanted to consider transferring it to a more flexible pension scheme

How did Greg help you?

Greg talked me sensibly through all the pros and cons of considering the transfer. This was a big decision so I wanted to make the right decision as you can't go back. I was under no pressure to proceed and felt I got a very balanced view.

Have you seen the outcome you were hoping for?

Yes - the transfer went ahead as agreed and the investments have performed in line with expectations since.

What could they have done better?

Nothing really - the process was very good

Review from Verified Client

Buckinghamshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed a pensions adviser when I retired 4 years' ago.

How did Greg help you?

Greg enabled me to move my defined contribution pension into a SIPP that provided a drawdown capability. He also enabled me to crystallize my pensions before the lifetime allowance was exceeded. We reinvested the lump sum from the pension crystallization in a GIA and ISAs. All the investments have out-performed industry standards over the last 4 years.

Have you seen the outcome you were hoping for?

Yes. All my investments have out-performed relevant industry benchmarks.

What could they have done better?

Nothing to improve. Greg is always available for updates if my circumstances change and we have regular communication; quarterly updates of what is happening in the financial world and an annual rebalancing of my investments.

Review from Verified Client

Surrey | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Initially I was looking to transfer some company AVCs and another small pension investment to a personal pension plan. Since that time Greg has provided other investment advice on a periodic basis as well as monitoring the pension.

How did Greg help you?

He researched appropriate investments and platforms and provided detailed recommendations to meet my needs. He then took care of the transfers.

Have you seen the outcome you were hoping for?

Yes. The pension has performed roughly in line with expectations and I find it helpful to know that it is being monitored on a regular basis. I also find it extremely beneficial to be able to consult Greg for other investment or pension advice on an ad hoc basis. His advice is considered and always takes full account of my circumstances and preferences.

What could they have done better?

Nothing.

Review from Verified Client

Buckinghamshire | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Change in personal circumstances.

How did Greg help you?

Reviewed financial portfolio

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Gregory's advice is very professional

Review from Verified Client

London | November 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were unhappy with our last financial adviser and needed someone to help us with our investments

How did Greg help you?

Greg is very personable. He has a great understanding of the pension planning process and options. I have also taken Greg's advice for my ISA investment. I am very happy with the advice he gave which has provided a surprisingly high return for relatively low cost.

Have you seen the outcome you were hoping for?

Yes. My pension investments have exceeded market performance since Greg started to organise my pension and ISA investments

Review from Verified Client

West Yorkshire | January 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Reviewing investments, ensuring good returns and making changes where appropriate

Review from Verified Client

Hertfordshire | January 2015

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Clear & comprehensive presentations for the savings / investment / pension options available and full service for any changes to be made

What could they have done better?

Occasional delays in providing the agreed info so, possibly, too much work taking longer time to deliver than expected

Review from Verified Client

Surrey | December 2014

★★★★☆ 3 out of 5

Advice: ★★★☆☆

Service: ★★★☆☆

Value: ★★★☆☆

My adviser understands my situation and acts accordingly

What could they have done better?

I could possibly do with seeing him a bit more often

Review from Verified Client

Worcestershire | December 2014

★★★★☆ 3.7 out of 5

Advice: ★★★★☆

Service: ★★★★☆

Value: ★★★☆☆

Surveys should be 'tick box' only. Asking for verbal diatribe will, I suspect, significantly reduce your reply rate!

What could they have done better?

Please see above.

Review from Verified Client

South Yorkshire | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Greg is very approachable and always helpful. I feel confident that he is very thorough in his keeping up to date with the ever-changing rules and regulations. I am confident that his advice is sound and am happy to follow his suggestions.

What could they have done better?

Can't think of anything. Greg is willing to travel up to see us if we need it, so the distance is not a problem.

Review from Verified Client

Berkshire | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

He listens to your hopes and expectations. Advises as to whether they are obtainable, and if not why, and then points you in the direction of where to obtain those goals.

What could they have done better?

Could keep you better informed about the progress being made when queries arise.

Review from Verified Client

Hampshire | December 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★

Greg has an excellent team. They are not at all 'pushy' with their products, offering great advice in a difficult market. Greg is very good at explaining the details of the advice that he gives.

Review from Verified Client

Devon | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Greg actively listened to my wishes, took the time to understand my overall investment objectives, and then provided a logical, reasoned, transparent and realistic plan to achieve them and consolidate my investments at reasonable cost and with risk that I was comfortable with. In particular, one challenge was to provide residential care for a relative, using available capital, provide income to cover all LTC costs going forward, preserve the capital as far as possible and ensure an appropriate level of risk. This has been more than achieved, and Greg has provided balanced advice during this journey.

Review from Verified Client

South Yorkshire | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Greg Neall was introduced to us by David Routh a few years ago and since then he has helped my wife and myself with advice on our ISAs, Insurance products, my drawdown and much invaluable tax planning advice. Any query by letter, phone or email usually results in a response from him the following day, which is most reassuring. He has called on us at our home most years for face to face contact, and is currently helping us with an Inheritance Tax / Flex Transfer Trust problem which has arisen as a result of lack of attention on the part of a firm of solicitors. In all our dealings he has been most generous with his time, and we are most grateful to have him as our Financial Adviser. In addition, he has proved to be excellent company on the occasions when we have sat around a table for a meal together. Tony Davies.

What could they have done better?

We can't think of anything that he might be able to do better than he already does.

Review from Verified Client

Hampshire | December 2014

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Greg Neall reviewed and simplified my pension and investment portfolio. At age 75 I was

legally required to reallocate my personal pension fund which involved setting up a savings trust fund and launching a discretionary trust fund for my family. This involved a lot of researching and gathering together information before the 2 funds were finalised. I believe the result was worth the fee but it did take a lot longer than he forecast. I now have a simplified savings and investment plan which he regularly reviews and reports upon.

What could they have done better?

There were some glitches involving duplication and omission in the admin system in the early days but it has now improved.

Review from Verified Client

Surrey | December 2014

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Regularly reviews my portfolio and advises on progress. Understands that part of my finances that I entrust to his advice and integrates with but doesn't try to influence investments outside his remit. Provides regular newsletters. Is responsive to queries and inquiries and is proactive in recommending changes when performance by Trust Managers is poor. Arranged investment for Interest in Possession Trust funds

What could they have done better?

Fully understand that my wife's and my portfolio should be treated as one. For example. split investment placement does not have to be halved between portfolios but one placement may be made fully in one portfolio and another in the other.

Review from Verified Client

Merseyside | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Greg explains everything in a clear and concise manner, he is also able to answer any questions I had. I have had Greg acting on my behalf for over 5 years now and he is always in constant touch with me to update me on how my SIPP is doing. I have no problems with Greg

and look forward to continuing the working relationship with him for many years to come

What could they have done better?

Being able to meet with Greg more than once/twice a year

Review from Verified Client

Cambridgeshire | December 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

very personable and easy to talk with. Listens to your aims/risks/fears and advises appropriately. Feedback is good.

What could they have done better?

I live too far away to have personal contact, but Greg & staff have always supported me by 'phone/ email etc.

Review from Verified Client

Dorset | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

My adviser, Greg Neall, helped me transfer my pension when I was approaching age 75 so that I could benefit from the new rules. He has looked after me since then with regular contact and newsletters. He has kept me up to date with rule changes. He has been very generous with his charges. He is a highly qualified pensions adviser.

What could they have done better?

I cannot think of anything.

Review from Verified Client

Surrey | December 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Investigates products fully. Does not just for the one that is the cheapest/expensive. Take the time to get to know you and your needs
