

Wellesley

# Client testimonials

**Ian Howard** AFPS

Chartered Financial Planner



## **Ian Howard – Chartered Financial Planner**

Ian has been with Wellesley since 2006 and in the industry since 1990. People often ask Ian what he does; he says, simply: “I help people.”

With such a myriad of choices out there, Ian always asks clients what it is they do or don't want to do, and takes it from there. Once he's established a relationship with a client, he likes to keep in touch regularly to stay up to date with their interests – once they're happy, he's happy!

## **Out of hours**

Ian is married to Julie, and they live in East Preston with their two sons, Louis and Harry, as well as Nelly the dog. He coaches junior football as well as enjoying tennis and fitness. Ian would like to find some free time; however, being a Nottingham Forest fan, it's probably best not to spend too much time following sport!

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We have known Ian since 2011. I received my pension at that time and needed some advice on how best to invest the cash lump sum I was to receive.

He has also advised me regarding ISAs and Trusts. Ian has a very friendly and approachable attitude towards his clients and has sought to understand the whole of the family circumstances prior to offering any financial advice. Now the whole family are clients of Ian.

We have regular reviews of our investments with him and the administration support from Wellesley is extremely good. I would certainly recommend Ian to any prospective clients.

Bob & Sue Dowding – Retired

I have known Ian since early 2008 when Wellesley took over as my financial advisers. Almost immediately my position improved, following clear concise advice. Ian explains everything very clearly and in simple terms that you can easily understand. I've always found Ian to be available and on hand when I've needed his advice and he has become a trusted confidant as well as a trusted friend.

I would highly recommend Ian to anyone needing financial advice or assistance. His continued commitment and sound advice have given me confidence for which I will always be most appreciative.

Jamie Laister – Global Alliance Director



Ian always has a very polite and friendly approach, making you feel very relaxed and you know that he has your best interests in mind. He has always given clear advice and information to me, who might not always know the mechanics of financial security.

Nick Wright – Retired

Ian is a pleasure to work with. Nothing is too much trouble and always good advice delivered in a way that just makes sense. Ian represents a 'safe pair of hands'.

Chris Wortt – Partner Client Lead

We've been working with Ian for over five years now and from the very first meeting I've been very impressed by his knowledge. He has proven to be very trustworthy and always gives sound advice.

Nicky Hill – Vice President Business Operations

Ian has always listened carefully to my financial goals and to understand our family requirements. I trust Ian's sound advice and his counsel. The service and support has always been superb. I would not hesitate in recommending him to anyone.

Paul Wolstencroft – Head of Global Logistics

Over a number of years, I have found the guidance and support from Ian to be absolutely superb.

Ian is the consummate professional who has proved to be trustworthy and loyal, and his financial planning and support are something I would certainly recommend without hesitation.

Danny Rogers – Vice President Global Channels

Ian has provided valuable and cogent financial advice.

The information provided has been apposite, timely and complete, but tempered with realism so that we have not incurred unnecessary expenditure. Furthermore, I held personal pension plans for almost 14 years and, having transferred them to Wellesley, now feel that my interests are being looked after at last.

Leonie Ranson – Retired

