

## Client Reviews

### Chris Brennan

Blackstone Financial Management Limited



4.9 out of 5

Review from Verified Client

Cheshire | November 2022

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed someone more skilled than me to give me long term financial advice

**How has Chris helped you?**

Yes always

**Have you seen the outcome you were hoping for?**

Mostly yes

**What could they have done better?**

Not sure he could

Review from Verified Client

Cheshire | November 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Chris helped you since your last review?**

I needed quick income from my pension pot and further advice regarding the long term financial positions concerning me and my wife and the effects on the death of either one.

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Review from Verified Client

Essex | November 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Chris helped you since your last review?**

Due to changes in my circumstances there has been little changes in my investments. Chris keeps me updated on market trends and recommendations

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Review from Verified Client

Cheshire | November 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Chris helped you since your last review?**

Chris has helped in transferring my pension from a SSAPS to a SIPP, which remains an ongoing process. It is a wading through treacle exercise but Chris and his team have provided first rate advice and support.

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Review from Verified Client

Merseyside | October 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Chris helped you since your last review?**

Everything as previous. Good and regular contact which is always speedy and to the point. Has advised on current situations in a straight forward manner

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Review from Verified Client

Lancashire | October 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Chris helped you since your last review?**

Stocktons Retail Furniture Site is in the process of being purchased. Chris has been there for us every step of the way. Recommending specialist Tax Accounting advice, discussing best ways of utilising the funds of the Sale when monies come through. Phoning regularly for updates on Sale and being generally extremely helpful. Also has been in discussions with me as to what action to take when my mortgage term finishes in the near future. Wouldnt dream of making any financial decisions without him as we value his council

Review from Verified Client

Flintshire | December 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Chris helped you since your last review?**

Always at the end of the phone if I need him. Any requests I make are dealt with efficiently.

Review from Verified Client

Cheshire | November 2021

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

**How has Chris helped you since your last review?**

HE IS ALWAYS THERE WHEN I NEED HIM AND WHEN ASKED GIVES SOUND UNDERSTANDABLE ADVICE

Review from Verified Client

Essex | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

#### How has Chris helped you since your last review?

As retirement has got closer Chris has been a great sounding board in terms of ensuring that I will have a comfortable retirement meaning I could focus on the important issues away from the financial ones.

Review from Verified Client

North Yorkshire | November 2021

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

#### How has Chris helped you since your last review?

Chris has helped us as a company and also as individuals he has a very easy to understand way of discussing financial matters

Review from Verified Client

Cheshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

#### How has Chris helped you since your last review?

Chris has helped with investment planning which has proved to be productive, albeit in early days.

Review from Verified Client

Merseyside | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

#### How has Chris helped you since your last review?

Everything has been excellent and regular contact even just for advice is superb and always with a super prompt response. We have recommended Chris to a few friends who I believe feel similar

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Review from Verified Client

Cheshire | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

#### How has Chris helped you since your last review?

He has helped find me a very large mortgage for the property I have just purchased. He has discussed equity release with me. Retirement income. Sale of our business. Amazing adviser I wouldn't make a financial move without him. He even answers my queries when he is on holiday. Always goes above and beyond service wise

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Review from Verified Client

Cheshire | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

#### How has Chris helped you since your last review?

continued with the same level of customer advice and support when needed

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Review from Verified Client

Lancashire | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

### How has Chris helped you since your last review?

In ensuring that the assets of my late father's estate under his management were optimised .In particular, advice to transfer a considerable sum to AIM investments preserved them during the pandemic crash.

Review from Verified Client

Wrexham | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Investing my divorce settlement, pension and savings

### How has Chris helped you?

Provided sensible advice at a time when I was perhaps not functioning properly and may have made some rather rash decisions without his guidance.

### Have you seen the outcome you were hoping for?

Yes considering the turmoil in the markets. I asked for low risk investment.

### What could they have done better?

Nothing. He is always available on the phone to chat and it is extremely easy to make an appointment to come in to the office and talk face to face if necessary.

Review from Verified Client

Cheshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed advise on all business and investments.

**How has Chris helped you?**

Chris has been amazing with myself and my family, he has guided us though on all aspects,Chris and his team have been excellent.

**Have you seen the outcome you were hoping for?**

Yes we have.

**What could they have done better?**

We have been given 100% support in every in Everything. The advice in all aspects has been great. Would recommend Chris and all his team.

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Review from Verified Client

Cheshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

On the assumption that their field of experience was greater than mine.

**How has Chris helped you?**

Sound advice on all matters I asked his help on

**Have you seen the outcome you were hoping for?**

Yes

**What could they have done better?**

Not sure that I expected more of him. To my mind he has always been honest even if as is inevitable his predictions didn't always materialise.

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Review from Verified Client

Cheshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Chris Brennan has been my adviser for over 15 years and was recommended by my previous adviser when he retired.

**How has Chris helped you?**

His advice is well researched for for changing needs and he explains everything thoroughly. He is always available to answer any queries no matter how small.

**Have you seen the outcome you were hoping for?**

Yes

**What could they have done better?**

He could not do any more , I am totally satisfied with his service. Reliable and trustworthy.

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Review from Verified Client

Essex | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wanted a more thoughtful approach to saving for retirement and dont have the time or expertise to do this myself

**How has Chris helped you?**

Made me think about what I wanted from retirement and planned a strategy to allow me to achieve this

**Have you seen the outcome you were hoping for?**

Pretty much in a very uncertain environment

**What could they have done better?**

Not much that I can think of

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Review from Verified Client

Merseyside | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I retired and it was fairly obvious that my pension and my partner's pension were in need of some professional advice. Our accountant had recommended Chris to us at this stage.

**How has Chris helped you?**

He advised with no pressure what we should do with our pensions and investments giving many alternatives that he felt were suitable. In my case he identified a serious case of malpractice and resolved the issue to a most satisfactory conclusion. The work was difficult and I felt it was carried out at a very high professional level.

**Have you seen the outcome you were hoping for?**

Very much so - the pensions and investments are working well for us and are kept under constant review with at least annual adjustments if necessary.

**What could they have done better?**

Nothing could have been done better in my mind - I am 100% happy. I have now recommended many others including family and friends to speak with Chris.

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Review from Verified Client

Cheshire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Whilst running a business we were encouraged to set up a Small self administered pension scheme. Chris has worked very successfully on this project for many years.

**How has Chris helped you?**

By providing sound advice and a number of appropriate options.

**Have you seen the outcome you were hoping for?**

Yes we have been very satisfied with the outcome.

**What could they have done better?**

We always received a very personal and reliable service.

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Review from Verified Client

North Yorkshire | October 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

a financial adviser is a necessity and not a luxury

**How has Chris helped you?**

Chris has helped us as a company and also as individuals he has a very easy to understand way of discussing financial matters

**Have you seen the outcome you were hoping for?**

pretty much yes and the variance has been down to volatile markets

**What could they have done better?**

i don't see that Chris could have done much more in all honesty ..he was proactive and i personally found Chris very easy to talk to

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Review from Verified Client

Cheshire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had never been involved with managing financial affairs as my husband had previously

taken complete control in that area, he passed away very suddenly and i was thrown into many difficult situations which i felt ill prepared to deal with.

**How has Chris helped you?**

He was reassuring and incredibly helpful at a very difficult time.

**Have you seen the outcome you were hoping for?**

yes, definitely.

**What could they have done better?**

nothing

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Review from Verified Client Value: ★★★★★  
Lancashire | October 2020 Service: ★★★★★  
★★★★★ 5 out of 5 Advice: ★★★★★

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

Chris was recommended to my father by my brother-in -law.

**How has Chris helped you?**

I worked with Chris to take over the management of my parents' estate when they became elderly.

**Have you seen the outcome you were hoping for?**

The investments that Chris made on my parents behalf proved more than adequate to fund the cost of care in their old age. My parents and our family were extremely grateful that therefore none of us needed to worry when these costs needed to be met.

**What could they have done better?**

Nothing

Review from Verified Client

Cheshire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Our Furniture Company Stocktons was doing incredibly well and my parents suggested I talk to their Financial adviser as I had just got married had a child and one on the way

### **How has Chris helped you?**

He put all my affairs in order.He made very helpful financial suggestions.Wasnt pushy at all just laid out all the ideas out and gently suggested what would work best in my circumstances

### **Have you seen the outcome you were hoping for?**

Yes totally in fact I wont make a financial decision without consulting him first.Also recommended him to all my family and friends who are of the same opinion. He is a fabulous financial adviser. I call him Guru

### **What could they have done better?**

Nothing really he always replies to my Financial questions extremely fast even when he is on holiday

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