

## Client Reviews

### Stephen Surtees

Homeworks Financial Solutions Limited



5.0 out of 5

Review from Verified Client

Nottinghamshire | July 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Re-mortgage of my current property

#### How did Stephen help you?

Reviewed my financial circumstances, gathered my requirements then provided a comprehensive review of mortgage options available to me.

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

Yes

#### What could they have done better?

No improvement suggestions, good advice, easy process and appointments to suit my diary.

Review from Verified Client

South Yorkshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

For financial tidy up

**How did Stephen help you?**

Re arranged our mortgage as we were on a variable rate

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

Yes saved alot of money

**What could they have done better?**

In this circumstances no everything went very smoothly and no delays

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Review from Verified Client

South Yorkshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Services required to pull various pensions schemes that I had acquired over many years of different employers and to arrange a mortgage for my new house purchase in June 2019, following several years of renting. Stephen and his staff have been very helpful in securing all the financial products that I required and look forward to continuing the working relationship, for years to come.

**How did Stephen help you?**

He knows the market and I am self employed, so not straight forward in terms of mortgages.

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

Yes - my pension is all in one place and the mortgage requirements were dealt with at the relevant time. We are currently working together to build a property portfolio with BTL mortgages being processed at present.

**What could they have done better?**

Nothing to say on this question

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Review from Verified Client

South Yorkshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Change in financial circumstances

**How did Stephen help you?**

Offering advice on how I could invest my money.

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

In some areas.

**What could they have done better?**

N/A

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Review from Verified Client

Nottinghamshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I first looked to Stephen when i bought my first home and have been with him ever since.

**How did Stephen help you?**

Stephen has been providing me with advice on all manner of financial matters for over 20 years, he has also supported a vast number of my friends and family, often know he is not selling a product just helping out. He has also helped me to financial solutions after Divorce and Job loss.

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

I have consistently seen positive outcomes form Stephen, and some exceptional ones.

**What could they have done better?**

I believe I would benefit with the addition of a online calendar would help book his availability as he is naturally busy.

Review from Verified Client

South Yorkshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My partner and I were looking to buy our first home together. We wanted an expert to help us decide on a mortgage and life insurance package and to guide us through the application process.

### How did Stephen help you?

Stephen and the team are fantastic to work with. They initially advised us on the various mortgage options and secured an offer that best suited our situation. Fast-forward a few months and we were on a bit of a rollercoaster ride trying to complete on the house purchase during lockdown. Despite all the uncertainty surrounding the industry at that time, they were incredibly supportive and reassuring throughout.

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

Absolutely, especially given the period of unprecedented uncertainty during which we eventually completed the house purchase (May 2020). As I've now learned, it's quite normal to have to chase solicitors and estate agents during the house-buying process. But Stephen was the one getting in touch with us to check how things were going and to provide reassurance. Would recommend to anyone and we need look no further for similar services in future.

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Review from Verified Client

Yorkshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Other members of my family have used Stephen services for many year and i was a first time buyer, looking to get a single person mortgage. Stephen as since helped with all my mortgage and insurance needs.

### How did Stephen help you?

Steve and the team have looked after me and now my wife for over several years and they

have always gone the extra mile to make sure we get the best deal and are a friendly team to work with. Would recommend them to anyone looking for a mortgage or financial advice.

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

Yes without Stephen help i would have never got a mortgage and his advice and guidance as been excellent.

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

I am not sure what Stephen could have done better. Over the years i have been given good advice and gotten some of the best deals for my situations at that time.

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Review from Verified Client

South Yorkshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was buying my first home at a young age on my own so I wanted some support, advice and guidance on the process

#### **How did Stephen help you?**

Everybody that works here are so professional and friendly, especially Stephen and Connie! Buying my first home at such a young age I had so many questions and concerns and didnt even know if it would be possible. The patience, the advice and overall care from Homeworks was incredible and made me feel so at ease becuase I was never waiting long for an answer to all of my questions. Here I am again 3 years later remortgaging my first property months after buying my second property all during a world pandemic, nothing is ever too much for Connie and Stephen, Connie is a wonderwoman and gets things done quickly, she has been printing things off, sending them via post, scanning them in and even sending them to 3rd partys for me as I have no access to any of these things due to the pandemic, wherever I have struggled understanding or struggled to complete paperwork, Connie has been there for me and I thank her so much for this. I get constant updates from Stephen, he explains things thoroughly and always listens when I tell him my end goal, he goes away and does everything he can to achieve it, and always does! Stephen ALWAYS puts my best interests at heart, hes amazing! Since I first met Stephen, he has been nothing but professional, honest and approachable. Theres a lot of paperwork and a lot of terminology many people wont understand, specially at the age of 21 and I never felt too anxious or silly to ask any

questions as Stephen makes you feel at such ease every time you speak to him. Not only is it the work homeworks do, but the attention they give to their customers is second to none, I have received 'congratulations on your new home' cards, birthday cards every year, its the little things that make a big difference! I am forever grateful to be in such great hands with Stephen at Homeworks.

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

The outcome for me has been incredible! 3 years ago when I first met Stephen, he asked me what is my long term goal, I remember saying to him I wanted to own 2 properties, never did I think 3 years later that would have happened. It couldnt have if it wasnt for him!

**What could they have done better?**

I really couldn't have asked Stephen, Connie, or anyone at Homework's to have done anything more for me, they have gone above and beyond every single time that I have needed them.

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Review from Verified Client

South Yorkshire | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Having had a number of work place pensions I wanted to combine these in to one manageable portfolio

**How did Stephen help you?**

Stephen took the time to listen to my requirements before recommending the solution offered.

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

Yes, I now have a clear picture of my pension investments which I can monitor easily online. Stephen also regularly monitors my investments to ensure it continues to meet my needs

**What could they have done better?**

The service has been impeccable, Stephen is only a phone call away and always makes himself available.

Review from Verified Client

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Service: ★★★★★

Value: ★★★★★

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

First time buyer looking for a mortgage

**How did Stephen help you?**

Was recommended Homeworks to help find a mortgage for our first home. Their support and guidance was outstanding! Nothing was too big a job got them and I was very comfortable asking questions. Would definitely recommend them and will definitely be using again. Thank you Stephen and Connie!

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

Definitely! We have now moved into our home. Stephen went out of his way to support us during lockdown.

**What could they have done better?**

N/a

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