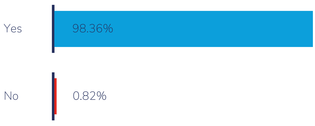
NAVIGATE

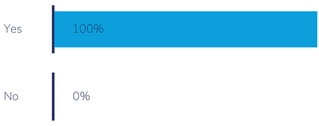
WEALTH | CLARITY | FREEDOM

“We carried out a client survey in 2024 to find out what our clients thought of us and the service we provide. Here’s what they had to say:”

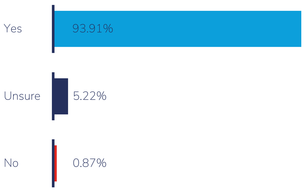
Would you recommend us to other people?



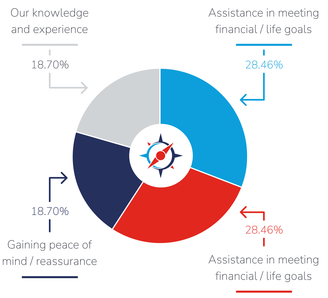
Do you believe working with us has helped / will help you to achieve your financial goals?



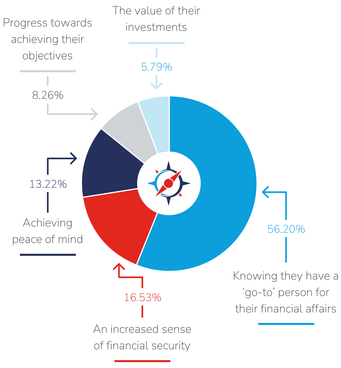
If you have invested assets with us, do you understand the level of risks you're taking?



What is the most important factor in our clients’ relationship with us?



How do our clients measure the value they receive from us?



What are the three biggest financial concerns which we help our clients with?

Those who have not yet retired:

- My family’s financial security should anything happen to me
- Not having enough money to retire at my preferred retirement age
- The level of investment returns

Those who have already retired:

- Not having enough money to continue living my preferred lifestyle in retiremente
- The level of investment returns
- The cost of care in old age

Business Owners

- Taking money from my business tax-efficiently
- The impact on my family and business if I die
- Creating and initiating a succession plan

What is the single biggest benefit you get from working with us?

Knowing I will always get good advice.

The knowledge and skills that are evident coupled with a professional personal touch.

Peace of mind, support and depth of knowledge that my financial affairs and best interests are being dealt with.

Taking the long view of financial planning, focusing on how our money allows us to maintain a good quality of life.

Excellent contact, being kept up to date with everything, and when there is a query we have, it is answered immediately.

Confidence that I have someone watching over my investments and being able to advise me of suitable substitutes if they are not performing to a satisfactory level.

Confidence that my investments are in safe hands and tailored to my current and future needs.

Knowing I am being looked after as time has been taken to get to know me.

Knowing our investments are being looked after in an honest and efficient manner.

Having a dependable relationship with someone who I know will give a prompt response to any queries I have

Get in Touch

www.navigateifa.com
office@navigateifa.com
02890 769 769

Studio 3, Strand Studios,
150 Holywood Road,
Belfast,
BT4 1NY