

## Client Reviews

### Steve Jackson

Jackson Potter



4.9 out of 5

Review from Verified Client

Tyne and Wear | October 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Remortgage.

#### How did Steve help you?

Sourced a number of mortgages and provided us with info of suitable options. Further advice given based on circumstance and what would be best option long term.

#### What is your current situation? Have you seen the outcome you were hoping for?

Yes. Steve also provided further advice on charges sent through by solicitor and his advice lead to identification of errors on part of solicitor and thus a reduction in fees.

#### What could they have done better?

NA

Review from Verified Client

| October 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

In need of buy to let mortgages.

#### How did Steve help you?

He was very knowledgeable in sourcing the products for refinancing and structuring the mortgages for buy to let purposes, and always came up with a solution within a short time. Also helped in form filling etc and brokered between lender and borrower.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes, in expansion of the property portfolio.

**What could they have done better?**

I do not think anybody could have done better, having tried various sources.

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Review from Verified Client

| October 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking to buy a house.

**How did Steve help you?**

Gave me an overview of what was available and found the best products for our situation.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes we have - very happy.

**What could they have done better?**

N/A

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Remortgaging a property and purchasing a new one.

**How did Steve help you?**

Excellent service from Steve. Always easy to communicate with and quick to respond, knows his stuff,

and very friendly as well. Have used him again when remortgaging, and have referred a number of friends and colleagues to him. Highly recommended!.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes.

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★

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

To seek a professional adviser who could provide a holistic market product range to fit my financial goals.

**How did Steve help you?**

Steve offered advice and focused on providers that could fit with my financial objectives.

**What is your current situation? Have you seen the outcome you were hoping for?**

The outcome was 100% positive. I am delighted with the service provided. Generic high street services would not be able to offer this level of product or service.

**What could they have done better?**

Nothing. Superb customer service.

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We wanted to release capital in our property and decided on a remortgage on buy to let.

**How did Steve help you?**

By taking note of exactly what WE wanted and making sure we received the best deal for us. The information was also clear, which enabled us to ask questions and make a decision.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes.

**What could they have done better?**

N/A

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Seeking the best deal for a mortgage for first house.

**How did Steve help you?**

Getting the right mortgage offer was particularly important as we were stretching ourselves and a sizeable chunk of our income was from overtime, bonuses etc. which are not always taken into account by mortgage lenders. Jackson Potter gave us really good advice on where would take into account our different streams of income and any trade-offs in terms of interest rate. We got a good deal on our mortgage for the right amount and all the fees, charges and exit terms were clearly explained.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes we got the right outcome for us and we would definitely use them again.

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was a FTB looking for an attractive mortgage that would give me multiples of salary and bonus.

**How did Steve help you?**

Steve did an excellent job explaining what was available in the market, different options in terms of repayment terms and gave us access to mortgage rates we did not see on the high street.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes, we have a good mortgage and Steve has been very prompt in providing alternatives for us in a fast moving housing market.

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Review from Verified Client

| September 2016

★★★★☆ 4.3 out of 5

Advice: ★★★★★☆

Service: ★★★★★☆

Value: ★★★★★

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

New mortgage.

**How did Steve help you?**

Fast and efficient service when speed was needed. Would definitely use again!.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes.

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were looking for a buy-to-let mortgage to enable us to grow our portfolio.

**How did Steve help you?**

Steve was excellent throughout the duration of the process, he helped us every step of the way and kept in constant contact to ensure the process was seamless as possible.

**What is your current situation? Have you seen the outcome you were hoping for?**

The outcome was exactly what we were looking for as Steve got the best deal to suit our needs. I will be using Steve again and would highly recommend him & his colleagues.

**What could they have done better?**

Steve couldn't have done anymore for us, he was brilliant throughout the entirety of the process.

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Review from Verified Client

| September 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

We were looking for a mortgage.

**How did Steve help you?**

With getting a mortgage and financial advice.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes.

**What could they have done better?**

I was happy with the service I received and was made to feel like nothing was a problem

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

When we purchased both homes and looking to re-mortgage.

**How did Steve help you?**

Steve Jackson helped us find the best deals, and continues to provide us with valuable advice and guidance when looking to re-mortgage.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes.

**What could they have done better?**

Nothing. They have given us options we hadn't considered which has always been in our best interests

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Finding the best deal for my property purchase.

**How did Steve help you?**

Arranged terms which were better than I could find via searching online / the high street.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes, Steve has also helped a number of my friends following referral.

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Already knew the term and structure I was looking for as I work in finance. However Steve gave me plenty of advice about how best to consolidate my finances before applying and found a lender which would go to the salary multiple I needed.

**How did Steve help you?**

Gave advice on applying, found a good rate on the amount I needed. He replied usually within the day on email or the next day which was great, most people relating property only seem to respond if you phone them which doesn't suit me as I'm busy at work, quick responses really helped.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes I got the house, even after 6 months delays with solicitors and the mortgage offer had expired, Steve managed to get the same amount of mortgage and with a lower rate in what was then a tight timescale.

**What could they have done better?**

nothing really, compared to agents and solicitors involved he moved the fastest and gave me only the advice I asked for

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Review from Verified Client

| September 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Looking to buy before selling a residential property in order to be chain free.

**How did Steve help you?**

He found suitable products with minimal fuss and with supporting documentation that could be readily provided.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes - he got me the mortgage products he said he would be able to.

**What could they have done better?**

Perhaps showed some of the options he'd discounted to prove he'd found the best all round deal.

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were getting our first mortgage and didn't know where to start.

**How did Steve help you?**

They guided us in the right direction in how to improve our credit rating and how much we would need to save for a deposit, they found us an amazing mortgage deal and helped us with the whole application. We couldn't have done it without them.

**What is your current situation? Have you seen the outcome you were hoping for?**

Definitely, we couldn't have purchased a home without the advise and help given.



Review from Verified Client

Berkshire | September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

In 2015 I was looking to get my first mortgage and I was also wanting to invest in the future in property.

### How did Steve help you?

Steve has helped me since 2015 arranging 4 mortgages for me and offering advice on investments in property.

### What is your current situation? Have you seen the outcome you were hoping for?

Steve has been phenomenal, he couldn't have been more helpful throughout each of the property purchases I have made. I would recommend him to anyone looking for mortgage services.

### What could they have done better?

Couldn't have done any better. I feel grateful for being introduced to Steve and he is currently arranging me another mortgage for an investment property as I write this review.

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Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Purchase first property. Had difficulties finding a mortgage and other brokers had let us down.

### How did Steve help you?

We were passed Steve at Jackson Potter's details by a close friend who had use them for years. We were trying to get on the property ladder with our first house and had been led around the houses (excuse the pun) by several other mortgage advisors. After speaking with Steve within 5 minutes he had a mortgage in principle and we managed to buy our first home. Since then they now look after all our life insurance cover and have negotiated our new mortgage on our second house. We'd never go elsewhere or try and deal with getting a mortgage ourselves. Jackson Potter are true professionals with lots of connections within the industry to find you the best deals available. Highly recommend to

anyone looking for a mortgage broker that takes away all the hassle.

**What is your current situation? Have you seen the outcome you were hoping for?**

Yes, even more than we expected.

**What could they have done better?**

Nothing

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