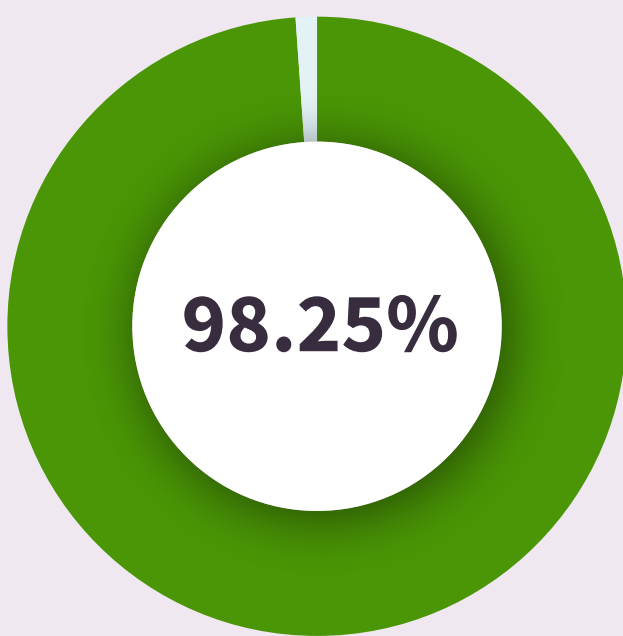




of our client believe that working with us has helped or will help them to achieve their financial goals.



of our clients would recommend us to other people.

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



Our knowledge and experience



Gaining peace of mind/ reassurance



Providing a safe pair of hands



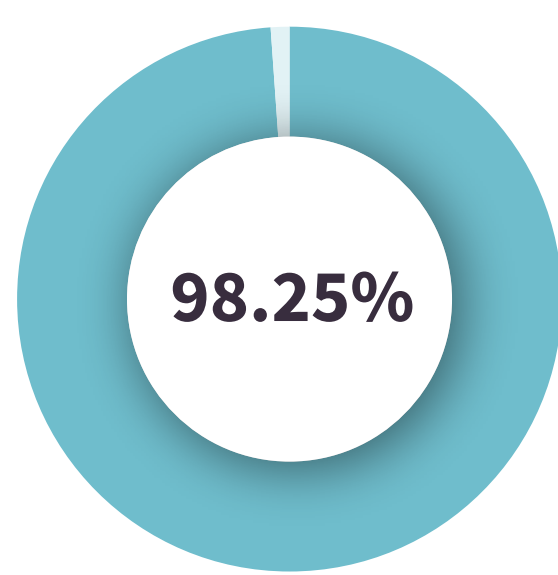
Support and assistance in meeting financial/ life goals



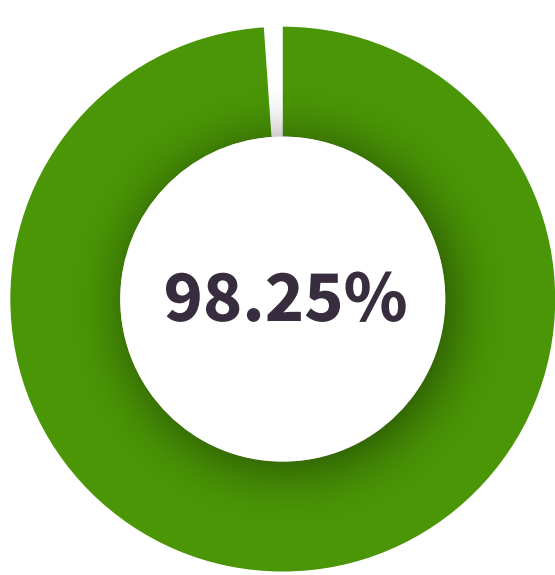
Investment management

Our performance

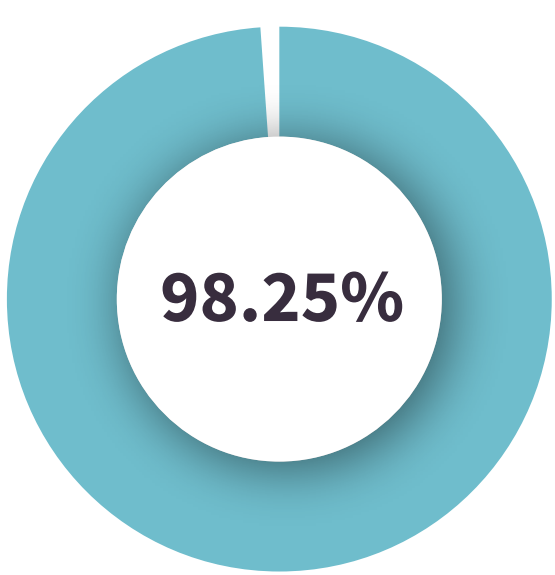
We were pleased to see how satisfied our clients were with our performance. We’re very happy to say that:



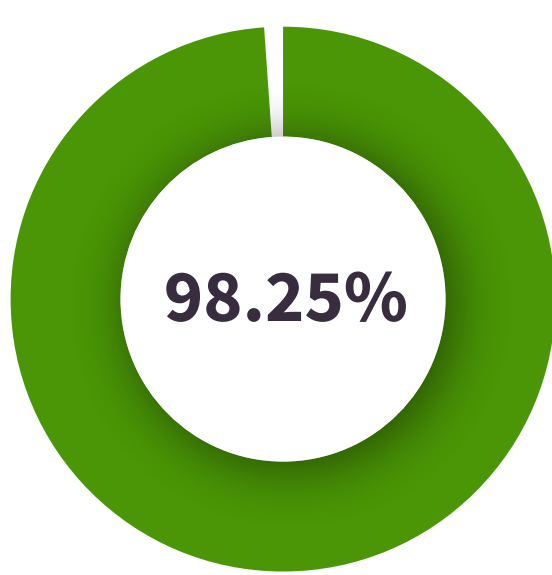
of clients were satisfied with their Forward Planning Meetings



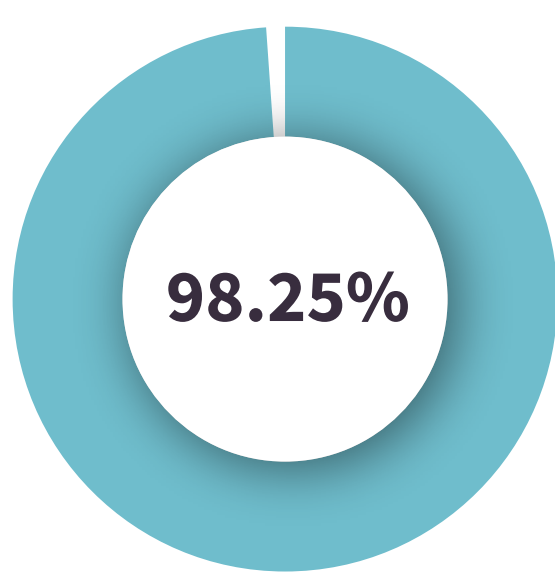
of clients were satisfied with the communication between our meetings



of clients were satisfied with the speed of response from our support team



of clients were satisfied with the speed of response from their Financial Planner



of clients were satisfied that we understood their needs, goals, aspirations, and objectives

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

Those on the path to retirement:



My family’s financial security should anything happen to me



Not having enough money to retire at my preferred retirement age



Not having enough money to live my preferred lifestyle in retirement

Those who have already retired:



The cost of care in old age



The level of investment returns or potential investment losses



Not having enough money to continue living my preferred lifestyle in retirement

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



“Peace of mind that someone professional is monitoring the performance of my pension part and being there for advice when I need it.”



“Knowing someone has got my back”



“Peace of mind. We never have to worry about our finances. They are in very safe hands.”



“Knowing my investments are in good hands and that I can discuss them at any time for advice and reassurance.”



“Confidence that the staff at Ardent are honest, truthful and have our best interest at heart”

Stay in touch

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