

Company Name: Poundbury Wealth Management LLP Primary Trade: Financial Services
Distance from you: 0.00Miles Contact Name: Katie Gallego
Full Address: 34A Holmead Walk, Poundbury
Dorchester
Dorset

Postcode: DT1 3GE Contact Telephone: 01305 266866
Contact Email: tim.gallego@sjpp.co.uk Contact Fax:
Company Website: <http://www.poundburywealth.co.uk>
Company Number: Contact Mobile:
Comments:

Location map:



Services Provided:

- Financial Services
- Insurance Services

Traders Overall Rating:  10 Points

Number of reviews: 25

Customer Service



Quality of Work/Service



Punctuality / Efficiency / Time Taken



Comments from consumers who have used this trader

20-Feb-2019	Positive, professional & relaxed atmosphere in office. All staff seemed to care about delivering the best service possible, excellent !
15-Feb-2019	Great team, very professional and friendly service, very pleased.
29-Sep-2017	Very good & professional financial advice & investments.
29-Sep-2017	Financial Investment Advice - all good.
19-Sep-2017	Informative & genuinely helpful advice - offering a bespoke, individual service.
19-Sep-2017	Attentive & helpful
13-Sep-2016	I needed pension and financial advice regarding retiring. I found advice helpful, clear and easy to understand. I will use them again.
12-May-2016	Excellent.
12-May-2016	Can't fault service - very helpful and caring as well as proficient when dealing with financial advice and investments.
10-May-2016	First class.
10-May-2016	
10-May-2016	Very knowledgeable, pleasant and easy to talk to.
10-May-2016	Excellent - always pleasant and helpful, nothing is too much trouble.
10-May-2016	Excellent review of my investments. Very good personal service.
29-Mar-2016	Have always had good advice from the company
21-Mar-2016	Excellent service at all times - sound advice, both financially and in other family matters - nothing is too much trouble.
21-Mar-2016	Very helpful at all times, clear, dependable advice at all times.
15-Mar-2016	Excellent. St James's place advisors are very trustworthy and I think they have my best interests at heart
04-Mar-2016	I was treated with great courtesy and all details were explained clearly, so that I could make an informed

04-Mar-2016	decision on all matters discussed. Service provides good and reliable information and advice on both present and future investments.
04-Mar-2016	Attentive, well explained investment advice.
01-Mar-2016	Always helpful and advice always appreciated.
15-Feb-2016	The adviser came to discuss my financial affairs. He had all details to hand, gave me good honest advice and I trust him completely along with the company to look after my needs. He explained clearly both the benefits and the risks involved.
08-Feb-2016	Sound advice given.
10-Nov-2015	The principal of Poundbury Wealth Management visited us in Bristol, some 80 miles from Poundbury. He was conscientious and well prepared in his services of our assets, asked us about our plans and discussed our needs with understanding providing social accommodations. He takes care to ensure he contacts us regularly to update us.