

Client Reviews

Tim Gurr

TK Gurr Financial Planning Limited



4.8 out of 5

This adviser has some reviews that were left while they were employed at a different firm to the one they are at now.

Review from Verified Client

Kent | July 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Family bereavement

How has Tim helped you?

By giving impartial advice and making it easy for us to understand.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

West Sussex | July 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Coming up to retirement

How has Tim helped you?

He has helped me plan my retirement.

Have you seen the outcome you were hoping for?

Yes, I think so

What could they have done better?

Nothing

Review from Verified Client

Oxfordshire | July 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Recipient of inheritance

How has Tim helped you?

Withdraw the monies in a tax efficient manner, then modelled returns for a number of different investment strategies

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

n/a

Review from Verified Client

Staffordshire | July 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed power of attorney for my father and advice on his financial situation

How has Tim helped you?

Tim has helped us with an annuity for dads care costs and advised on investing

Have you seen the outcome you were hoping for?

Yes. Really helped explain all the options and laid out all possible scenarios in an extremely clear and understandable format

What could they have done better?

No. Very happy with the service from Tim

Review from Verified Client

Surrey | December 2022

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

My pensions were a mess.

How has Tim helped you?

He tidied up all my separate funds.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Oxfordshire | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Complex financial holdings i UK, USA and South Africa for wife and myself

How has Tim helped you?

Always informed advice for elderly couple still active. Investments and planning for the future.How to handle scam.

Have you seen the outcome you were hoping for?

stable return at turbulent time

Review from Verified Client

London | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Feeling very confused about the whole matter

How has Tim helped you?

Tim enabled me to feel much more in control of my financial choices, through having a clear understanding of the financial matters that were relevant to my situation

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Can't think of anything

Review from Verified Client

Durham | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement and long term planning

How has Tim helped you?

He has invested the time required to understand our goals and to develop a plan to meet them, giving clear and timely advice.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

N/A

Review from Verified Client

London | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I took the decision to retire from work as I had reached the pensionable age but needed advice and guidance on the pension options available under my employment scheme in order to make the best choices for myself and my family.

How has Tim helped you?

Tim disseminated the information provided by the pension company, explained this to me in layman's terms and gave me the confidence to make the right choices. Tim also guided me on the importance of financial planning for the future to help ensure that my goals and aspirations were catered for.

Have you seen the outcome you were hoping for?

Yes, I am comfortable with the choices I have made based on Tim's advice and guidance. I am now waiting for the pension company to implement these choices.

What could they have done better?

N/A. Tim has been brilliant throughout the process!

Review from Verified Client

Hertfordshire | September 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I required pension and related tax advice prior to drawdown.

How has Tim helped you?

Tim was able to provide concrete and invaluable advice on the various pension tax liabilities. He checked the numerous pension calculations thoroughly, devoting an inordinate amount of time in correspondence with the pension administrator to secure the most satisfactory outcome. He analysed all pension drawdown options suggesting an alternative (that was not initially offered by the administrator) that proved to be most beneficial to me. I appreciated Tim's business integrity and his dogged determination to get the very best outcome for his client.

Have you seen the outcome you were hoping for?

With Tim's help the outcome exceeded my expectations and I believe that it could not have been bettered.

What could they have done better?

None.

Review from Verified Client

West Sussex | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had various Pensions which required consolidating and Tim was recommended to me.

How has Tim helped you?

Tim gathered my pensions together and advised where I should invest monies.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Tim is my first financial adviser and I am very pleased with the outcome.

Review from Verified Client

London | June 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

After setting up a new company, I needed advice on how to best structure my finances

How has Tim helped you?

Tom advised me on relevant investment strategies, discussed longer term financial planning, reverse engineered longer term goals

Have you seen the outcome you were hoping for?

Currently very satisfied with the outcome of the advice

What could they have done better?

No - Tim had a sound knowledge and came up with innovative solutions

Review from Verified Client

Hertfordshire | December 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To maximise use of available funds.

How did Tim help you?

Tim is very knowledgeable, and explains things with great clarity, which is particularly helpful for my wife and I in understanding, and therefore in decision making. His follow-up is also clear and timely.

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

Yes.

What could they have done better?

Frankly, I cannot think of any particular area which Tim has not adequately covered for us.

Review from Verified Client

Sussex | December 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Planning for retirement. Wanting advice and help on investing our savings.

How did Tim help you?

Primarily by understanding our particular situation thoroughly; providing the relevant information and advice we needed and particularly by clearly and patiently explaining everything and answering our questions. We find him very helpful.

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

Yes, - we have been happy with his advice, the performance of the investment products he suggested and the work he has done for us on our pensions.

Review from Verified Client

Kent | December 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I was looking to tidy up my pension arrangements.

How did Tim help you?

He tidied up my pension arrangements.

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

yes.

Review from Verified Client

Surrey | December 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Complete ignorance on pensions.

How did Tim help you?

Consultation with explanations given, meeting with myself and wife and written report.

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

Yes.

What could they have done better?

Nothing to speak of.

Review from Verified Client

Middlesex | November 2016

★★★★☆ 4 out of 5

Advice: ★★★★★☆

Service: ★★★★★☆

Value: ★★★★★☆

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

Planning for retirement.

How did Tim help you?

Helped plan what we need to earn in retirement to match our current lifestyle.

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

Yes.

Review from Verified Client

London | November 2016

★★★★☆ 4 out of 5

Advice: ★★★★★☆

Service: ★★★★★☆

Value: ★★★★★☆

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

Following the reduction in the Lifetime Allowance in 2014, I found Tim online for advice on whether I should remain in my employers pension scheme or leave and seek Fixed Protection.

How did Tim help you?

Tim carried out a thorough analysis of my existing pensions and summarised these in a report so that I could consider his advice and weigh my decision.

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

Yes, Tim is now my financial adviser and I have gone back to him for advice on my other investments and putting a strategy in place to boost my retirement savings. We now meet every six months.

What could they have done better?

I am happy with the service that has been provided



Review from Verified Client

Oxfordshire | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Portfolio passed on from previous manager.

How did Tim help you?

Provided detailed and informed professional advice. Kept in touch regularly with helpful suggestions.

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

So far so good.

What could they have done better?

No further suggestions



Review from Verified Client

London | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

As my retirement date was approaching, I needed to rationalise my existing schemes which had been set up many years ago and needed to be updated in light of the then current legislation. I had known Tim on a professional basis and he seemed the natural choice for my personal requirements.

How did Tim help you?

He reviewed my existing Personal Pension plans and my Occupational Scheme and recommended the setting up of a SIP and then combining the funds into this.

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

Yes, this is currently in operation.

What could they have done better?

The best thing that any adviser can do is to listen to their clients and then find the right solutions to fit these requirements rather than to fit to pre-existing plans/ideas. Tim listens well and is flexible to adapt accordingly. Can never be sure that there is a 'better' option as you trust the ability of the advisor & firm based on their reputation.

Review from Verified Client

Dorset | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To have some protection of our savings on a long term basis with a reasonable income.

How did Tim help you?

By monitoring our investments and making suitable adjustments when necessary. And, keeping us informed of changes in addition to an annual meeting.

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

Yes.

What could they have done better?

No suggestions.

Review from Verified Client

Surrey | November 2016

★ ★ ★ ☆ ☆ 3.3 out of 5

Service: ★ ★ ★ ★ ☆

Advice: ★ ★ ★ ☆ ☆

Value: ★ ★ ★ ☆ ☆

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

Investment advice needed.

How did Tim help you?

He took particular care to understand my circumstances and needs. As a result his present firm Thomas Miller are responsible for the day to day investment decisions.He is a very personable and caring young man.

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

Partly.

What could they have done better?

The results from Thomas Miller Ltd have only partly achieved my expectations. As my personal contact Tim Gurr has been excellent.

Review from Verified Client

Northamptonshire | November 2016

★ ★ ★ ★ ★ 5 out of 5

Advice: ★ ★ ★ ★ ★

Service: ★ ★ ★ ★ ★

Value: ★ ★ ★ ★ ★

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

Annuity investment advice when I retired.

How did Tim help you?

Changed investments to a safer tax haven.

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

Not yet.

Review from Verified Client

Outside UK | November 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

To invest excess income, inheritance and find life insurance.

How did Tim help you?

Despite complex medical history he found life insurance for me which would greatly benefit family as I am main provider. Has set up investment portfolio for me which I am confident will see my excess income grow over the years which is another safeguard. Tim comes across as somebody who is competent in his advice which is always available as well as someone who I feel confident I can trust in the management of my portfolio.

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

So far yes.

What could they have done better?

Relative to circumstances not much more.

Review from Verified Client

Hampshire | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

The sudden death of my husband.

How did Tim help you?

He was extremely helpful in advising me about my investments and future planning for

possible future care home fees.

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

Yes.

What could they have done better?

Nothing

Review from Verified Client

Kent | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

my husband used to work in the City but knew that he wouldn't be retiring from there. So we first went to Robson Rhodes for investment advice and long-term planning.

How did Tim help you?

Tim replaced the previous adviser. We feel we have a good relationship with him, that he does his best for us and goes that extra mile. He explains things and guides us.

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

so far - yes.

What could they have done better?

we haven't thought of anything

Review from Verified Client

Ayrshire | November 2016

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We have always had a financial adviser since starting to accrue asstes.

How did Tim help you?

Very much so ,unlike others he explains all aspects to us and listens to our requests and has delivered on them all. We were going to change but gave him a chance and he has worked well for us.

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

As much as he can do in the present trading situation.

What could they have done better?

He delivers our needs and we do not think he could do better or we would ask him.

Review from Verified Client

Ayrshire | November 2016

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Dealt with a Glasgow Company that Thomas Miller bought over.

How did Tim help you?

Yes. Very friendly an professional.

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

Yes.

What could they have done better?

At this point in time I think I'am getting good advice. The monthly summary is very good. I suggested something like this some time ago. It's good that this has been introduced

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<https://www.vouchedfor.co.uk/financial-advisor-ifa/crawley/028818-tim-gurr/reviews>