

NEIL JAUNDRELL

Background report to support
inclusion in the **2019 Guide To The
UK's Top Rated Financial Advisers**



Neil Jaundrell

DNA Wealth Limited

 Top Rated 2019

4.7 / 5  25 reviews

VouchedFor checks:

 Recent Client Reviews

 Independent Financial Adviser

 Qualifications Uploaded

Services offered

-  Insurance & Protection
-  Pensions
-  Retirement income (annuities, drawdown)
-  Investments and Savings
-  Occupational Pension Transfers
-  Inheritance Planning

Qualifications listed

Standard Qualifications: 3 Qualifications

IFS - Award in Pension Transfers (AwPETR)

PFS - Member by Diploma

CII - Statement of Professional Standing (SPS)

[view more at the profile link below](#)

Client Reviews

Neil Jaundrell

DNA Wealth Limited



4.7 out of 5

Review from Verified Client

Carmarthenshire | February 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

The financial market is a nightmare to navigate if you don't know your way around it. It's also difficult to find anyone to help manage retirement finances when you haven't a lot to spare.

How did Neil help you?

Very open to the fact I didn't have a great deal of money to invest, but needed to safeguard what I had, considering I'm retired without a private pension.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Can't think of anything offhand.

Review from Verified Client

Cornwall | February 2019

★★★★☆ 3.7 out of 5

Advice: ★★★★★☆

Service: ★★★★★☆

Value: ★★★★★☆

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

Needed to restructure an untidy portfolio

How did Neil help you?

Advised on suitable investments for income to supplement our pensions and rationalised our portfolio.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Vale of Glamorgan | February 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We have always tended towards using a financial advisor.

How did Neil help you?

Mainly for pension planning.

Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Cardiff | February 2019

★★★★★ 4.7 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★☆

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

To put my pension and savings in a better place and to sort out my financial situation.

How did Neil help you?

I had a number of pensions which he has now sorted into one which I now understand.

Have you seen the outcome you were hoping for?

not as yet , early days.

What could they have done better?

under present pre brexit climate it has been difficult, hopefully when things settle after March 29th.

Review from Verified Client

Cardiff | February 2019

★★★★★ 5 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★

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

disappearance of previous advisor

How did Neil help you?

sorted out previous investment and also set up a new one

Have you seen the outcome you were hoping for?

Too early to say, especially in current Brexit uncertainty, but I've no reason to doubt that Neil will be keeping his eye on economic situations and will advise accordingly

What could they have done better?

at the moment, no suggestions Am happy so far

Review from Verified Client

Cardiff | February 2019

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement of previous financial adviser necessitated a change.

How did Neil help you?

He instigated a thorough analysis of our existing investments and recommended some changes.

Have you seen the outcome you were hoping for?

Up to now, yes.

What could they have done better?

Not aware of any detrimental decisions regarding my investments. Time will tell!

Review from Verified Client

Powys | January 2019

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wanting to know how best to invest savings for the future

How did Neil help you?

Gave very good advice which has done well over the term invested

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

He answered all our queries and cannot think of anything else which could have been improved

Review from Verified Client

Blaenau Gwent | January 2019

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To review our finances with potential to invest.

How did Neil help you?

Advised on potential options to suit what we are looking to achieve.

Have you seen the outcome you were hoping for?

Not yet. We are yet to decide on the level of investment wed like to make.

Review from Verified Client

Newport | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement

How did Neil help you?

Offered advice and guidance.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Torfaen | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were looking to reduce our hours of working when I reached 55 yrs. And wished to secure some financial support with my pension.

How did Neil help you?

Neil advised on how the pension could supplement my income that has allowed me to enjoy my 3 day week.

Have you seen the outcome you were hoping for?

definitely we have seen the financial rewards of the actions taken by Neil on our behalf.

What could they have done better?

We are 100% satisfied with the advice we have been given.

Review from Verified Client

Cardiff | January 2019

★★★★☆ 4.3 out of 5

Service: ★★★★★

Value: ★★★★★☆

Advice: ★★★★★☆

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

Serious inefficiency of previous financial advisor.

How did Neil help you?

Reviewed our investment portfolio and provided a far improved management plan after careful note of our circumstances and attitude to risk.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

My only slight problem was entirely understanding the full structure of the new arrangements as the plan was based on a completely new investment structure. This had more to do with the outdated management and very poor client contact of my previous advisor.

Review from Verified Client

Cardiff | January 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

i was told because it was over a limit

How did Neil help you?

he sorted out my pension pot

Have you seen the outcome you were hoping for?

yes up to now more pending

What could they have done better?

nothing really he did what was required for now

Review from Verified Client

Merthyr Tydfil | January 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Looking to invest a lump sum

How did Neil help you?

Good understanding of options and advice

Have you seen the outcome you were hoping for?

Currently invested too early to see any results

What could they have done better?

Nothing

Review from Verified Client

Cardiff | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Seeking professional advice on savings and investments

How did Neil help you?

Neil explained the different types of investment available to me and completed a profile based on my attitude to risk. After discussing all options we were then able to choose the most suitable plan to suit my requirements.

Have you seen the outcome you were hoping for?

Yes, I am happy that the chosen investments are right for me.

What could they have done better?

I have no adverse comments to make about Neil, he was most personable and professional.

Review from Verified Client

Bridgend | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had several issues which I needed to sort out, namely 3 old Pensions and a substantial sum of money left to me.

How did Neil help you?

Neil was very thorough and kept me informed throughout the process. Neil has continued to review my retirement planning and investments ensuring that I take my income in the most tax efficient manner.

Have you seen the outcome you were hoping for?

Definitely

What could they have done better?

Nothing, Neil met all of my expectations.

Review from Verified Client

Caerphilly | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

After my husband retired we consulted Neil and then when my husband died I felt Neil would look after my finance well, I trust him.

How did Neil help you?

Neil helped by giving me good advice and always willing to talk through any concerns that may arise.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Not sure because Neil always made himself available when needed.

Review from Verified Client

Bridgend | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had a number of pensions which I wanted to consolidate with a view to retirement planning.

How did Neil help you?

Neil was very professional in his approach and ensured he knew exactly what we wanted to achieve before formulating a plan. We were very happy with the pension plan he proposed and the way in which he kept us fully informed at each stage of the transfer process.

Have you seen the outcome you were hoping for?

We are very happy with the pension plan and feel it is in good hands going forward. Neil has achieved everything we asked of him and we feel very confident he will do an excellent job looking after our affairs from now on.

Review from Verified Client

Swansea | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension

How did Neil help you?

Transfer pension

Have you seen the outcome you were hoping for?

On going

Review from Verified Client

Merthyr Tydfil | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We wanted advice on safe havens for our pension funds and help with rationalising our investments.

How did Neil help you?

He has helped us relocate our pension funds in a provider with which we are comfortable. Our investments have been reorganised. We have an understanding of the issues surrounding our investments and IHT situation.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Cardiff | January 2019

★★★★☆ 3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement planning

How did Neil help you?

Continued to offer advice.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

More frequent reviews

Review from Verified Client

Bristol | January 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

We decided we needed long term financial planning through to the end of our careers and on to retirement. Neil's original firm was recommended by a relative and in the intervening time Neil has taken on our portfolio.

How did Neil help you?

Neil has provided sound, balanced advice taking account of a number of factors and made recommendations for long term investments. His fees are transparent and we are happy with his continued support.

Have you seen the outcome you were hoping for?

We are making long-term investments and so far performance has been acceptable; this question cannot be answered at the present time.

What could they have done better?

Perhaps a wider range of alternative investment opportunities to consider might have been helpful, even if it was only to understand that the ones we have pursued were clearly the best ones for us.

Review from Verified Client

Bridgend | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed pension advice made me aware

How did Neil help you?

Made me aware of various pension schemes

Have you seen the outcome you were hoping for?

Yes I havenothing

What could they have done better?

Nothing. He gave me the information I needed

Review from Verified Client

Vale of Glamorgan | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Firstly, to review a personal pension that had been neglected for a number of years. Subsequently to help with investments for a friend entering long term residential care. This was a tricky process as there were a number of different savings pots that had to be brought together. It was difficult to know where to even start.

How did Neil help you?

Neil found a better pension product which continues to perform well. He made sense of a lot of paperwork and guided us through the process of finding a low risk investment that provided what we needed.

Have you seen the outcome you were hoping for?

Absolutely, the investments provided an income which was essential

What could they have done better?

Neil is always easy to contact and regularly reviews the investments.

Review from Verified Client

Bridgend | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We had numerous pensions that we wanted to consolidate due to us reaching retirement age.

How did Neil help you?

Neil gave us advice on how we should invest our portfolio and maximise our investments.

Have you seen the outcome you were hoping for?

We have now been retired for twelve months and are extremely happy with the advice that Neil has given us.

What could they have done better?

Neil was recommended to us by friends who had already used his services, we found him professional and thorough.

Review from Verified Client

Somerset | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Advise on what to do with pension money and the mitigation of inheritance tax

How did Neil help you?

Neil Jaundrell has been my family's adviser since well before my husband's death in 2009. As my husband dealt with all our financial matters so I have relied heavily on Neil to lead me through my financial matters and to keep such savings as I have from fading away. He is always there for me if I get financial correspondence I do not understand and always answers my queries promptly. It is a great comfort to know he is there for me.

Have you seen the outcome you were hoping for?

Despite the vagaries of the markets my savings are in a good condition so he must be doing the right thing

What could they have done better?

Knowing nothing about financial matters I could not say if he could have done better, I can only say I am happy with my financial position as it is at the moment and my life is calmer knowing he is there.
