

Client Reviews

Ravi Dadlani

Gate Capital Group



4.9 out of 5

Review from Verified Client

Berkshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Ensure I had sound investment for my pension fund

How did Ravi help you?

Realise what level of risk I was willing to accept in my investments

Have you seen the outcome you were hoping for?

Yes some growth in the fund

Review from Verified Client

London | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension

How did Ravi help you?

He helped me find a pension

Have you seen the outcome you were hoping for?

Have only had the pension for two months.

What could they have done better?

Nothing everything was great

Review from Verified Client

London | August 2020

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Review of my endowment pension with my current provider. Providing financial advice on transfer to another pension provider.

How did Ravi help you?

Facilitated withdrawal and transfer to a more tax advantageous QROP plan

Have you seen the outcome you were hoping for?

Yes, transaction was completed successfully as envisaged

Review from Verified Client

West Yorkshire | July 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

They Approached me several years ago

How did Ravi help you?

Initially Ravi helped me to consolidate my pensions but more recently he has provided me with a greater understanding of my investment options and the implication of my choices, the different levels of risk and what it means to me in real terms. Although its taken me a while to work out what I needed to know and understand once I worked this out Ravi provided clear and simple explanations and visual support.

Have you seen the outcome you were hoping for?

Yes and I now feel more comfortable in what my future outcomes are likely to be based on my change in circumstances and attitude to risk

What could they have done better?

Ravi has been very patient and gone over things with me on more than one occasion when I haven't been sure about things we've discussed in the past. Going forward it may be more beneficial to give the option of video call rather than just telephone for reviews as an hour plus is quite intense for telephone only.

Review from Verified Client

London | May 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Reached 55 and wanted pension advice

How did Ravi help you?

Provided me with options based on my circumstances

Have you seen the outcome you were hoping for?

Able to consolidate my pensions and drawdown a tax free amount

What could they have done better?

All good

Review from Verified Client

London | February 2020

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I recently went self employed and needed a pension plan

How did Ravi help you?

He gave advice on pension plans and how to save for retirement. I then took out a pension

plan with him

Have you seen the outcome you were hoping for?

Not yet as I have only just started investing.

Review from Verified Client

London | February 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Private Pension

How did Ravi help you?

Explained to me in details the various products available that best suit my personal needs

Have you seen the outcome you were hoping for?

Yes, I feel confident that Ravis advise was gold standard

Review from Verified Client

London | December 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pensions plans maturing,

How did Ravi help you?

Consolidating,, transferring and arranging a draw down

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

I don't think he could have done anything better

Review from Verified Client

London | December 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

first home

How did Ravi help you?

life and critical illness insurance

Have you seen the outcome you were hoping for?

yes

What could they have done better?

he was extremely helpful and so i do not think there is anything that should have been done differently

Review from Verified Client

West Yorkshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

They approached me

How did Ravi help you?

Consolidated my pensions into one pot

Have you seen the outcome you were hoping for?

ongoing

Review from Verified Client

Hertfordshire | November 2019

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

As a self employed person I needed to invest in another pension to boost my savings for retirement.

How did Ravi help you?

Very Professional

Have you seen the outcome you were hoping for?

Partly

What could they have done better?

His advise was put into laymans terms that I could understand.

Review from Verified Client

London | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

The need to save money.

How did Ravi help you?

He talked me through a range of options to save and together we came up with the perfect option for myself. I was able to assess how cautious I wanted to be with my investments and how much money I could afford to save. It was a perfect combination of advise and my own decisions.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing.

Review from Verified Client

Staffordshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wanted to move a DB fund to a DC fund to protect the cash in the event the company fell into difficulties.

How did Ravi help you?

Used the FCA's insistent client route to make it happen.

Have you seen the outcome you were hoping for?

Ravi provided me the exact outcome I was looking for.

Review from Verified Client

Cumbria | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

moving pension

How did Ravi help you?

moved pension

Have you seen the outcome you were hoping for?

yes

Review from Verified Client

Middlesex | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Due to change in personal circumstance, we were looking for a product to cover unexpected events in the future and also offer peace of mind at the same time.

How did Ravi help you?

Ravi was able to arrange a meeting and explained to us various products available to us specific to our requirements. We were able to go away and think about what we had discussed and came back with more questions, which Ravi professionally answered and further help narrow down our search.

Have you seen the outcome you were hoping for?

In short yes.

Review from Verified Client

London | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Offered through work so took up the opportunity.

How did Ravi help you?

Set up a new savings scheme and clarified my pension details.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing!

Review from Verified Client

Somerset | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Clear information and advise

How did Ravi help you?

Changed investments when required with my input

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

London | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to invest a lump sum and start a private pension

How did Ravi help you?

He explained me in details all my options evenand covering some basic things of the financial sector that I wasn't aware of and helped me find a good solution for me

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

North Yorkshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Pension check

How did Ravi help you?

Explaining every thing in a way I could understand

Have you seen the outcome you were hoping for?

Early days yet but I am sure my pension is in good hands

What could they have done better?

Just be himself down to earth no fancy words

Review from Verified Client

Cheshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wanted to review my finances but had no contact with my old adviser for a few years. Gate capital contacted me at the right time and went from there

How did Ravi help you?

Ravi went through everything in fine detail, giving me plenty of options, making sure I understood everything that was being said.

Have you seen the outcome you were hoping for?

Yeah so far so good.

What could they have done better?

Nothing comes to mind, he stays in regular contact and they don't push you into anything.

Review from Verified Client

Derbyshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I'm self-employed and needed some guidance and professional advice on finding the correct type of pension for myself and setting it up.

How did Ravi help you?

He found a personal pension to be best suited to my needs and then assessed my attitude to risk, which I agreed with.

Have you seen the outcome you were hoping for?

Yes, the pension has been set up without a hitch and I'm now contributing automatically to it each month.

What could they have done better?

Having was handled perfectly it's hard to find any points for improvement, Ravi was understanding and I felt reassured by his approach and attitude. He made a difficult task I was tackling much simpler and easy to navigate.

Review from Verified Client

Staffordshire | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To pay off or pay most off my mortgage when i retire

How did Ravi help you?

He advice me the best way to invest my money to get the best results

Have you seen the outcome you were hoping for?

yes slowly under the circumstances we live at the present time

What could they have done better?

My adviser couldn't do any better than what he is doing now

Review from Verified Client

Surrey | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking to invest my teaching AVC's on retirement.

How did Ravi help you?

helped me find a very competitive rate that took into account my recent health history

Have you seen the outcome you were hoping for?

Yes. The yearly sum would be better than had I not moved the money.

What could they have done better?

I was very happy with the deal and he has kept me up to date by phone and email.

Review from Verified Client

Middlesex | September 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Early retirement and pensions with different providers needing to be put in one place

How did Ravi help you?

Excellent advice, listened to what I wanted and acted giving me option,s and advice

Have you seen the outcome you were hoping for?

The outcome is extremely positive and I'm looking forward to a good future

What could they have done better?

I'm not sure ravi and raveen could do any more he gave me excellent advice as well as keeping me informed about everything each step of the way, phone call,s and email,s

Review from Verified Client

Staffordshire | September 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To have more flexibility on accessing my private pension on retirement

How did Ravi help you?

He advised me on how to move the pension to a more suitable portfolio

Have you seen the outcome you were hoping for?

Hopefully when I retire I will have the flexibility to implement drawdown payments

Review from Verified Client

Staffordshire | September 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I needed to transfer my pension

How did Ravi help you?

By advising me where to transfer my pension

Have you seen the outcome you were hoping for?

Yes at the moment my pension fund is making money

What could they have done better?

Not sure he could have done anything better when i first spoke with Mr.Dadlani i needed to move my funds quickly and i think they are invested in a good place with his advice

Review from Verified Client

Somerset | September 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Securing advice on pension investments

How did Ravi help you?

Explained in detail investment types and transferred to different scheme when thought appropriate

Have you seen the outcome you were hoping for?

Yes very much

What could they have done better?

Nothing always available when required

Review from Verified Client

Surrey | September 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

consolidated 3 pensions

How did Ravi help you?

Ravi explains everything simply and clearly and answers all my questions - hes a good listener too

Have you seen the outcome you were hoping for?

yes good outcome

What could they have done better?

nothing
