Vouchedfor

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Simon Mansell

Temple Bar Independent Financial Advice Limited

Top Rated 2026

4.9 / 5 187 reviews

VouchedFor checks:

- FCA Regulated
- Recent Client Reviews
- Independent Financial Adviser
- Qualifications Uploaded
- Positive First Impressions

Services offered

- Investments and Savings
- Pensions
- Retirement income (annuities, drawdown)
- Pension Transfers - Non Specialist
- Inheritance Planning
- Insurance & Protection
- Auto Enrolment

+ 1 more service

Qualifications listed

Standard Qualifications: 3 Qualifications

IFS - Diploma for Financial Advisors

CII - Certificate in Financial Planning

IFS - Statement of Professional Standing (SPS)

view more at the profile link below

https://www.vouchedfor.co.uk/financial-advisor-ifa/worcester/029071-simon-mansell

Vouchedfor

Client & First Impression Reviews

Simon Mansell

Temple Bar Independent Financial Advice Limited

★★★★★

4.9 out of 5

Review from Verified Client

Worcestershire | October 2026

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Had own business and needed a financial advisor

How has Simon helped you?

Our relationship with Simon goes back an incredible 32 years, during which time he has guided us through pensions, investments and estate planning.We remain actively involved and in regular contact, and can honestly say that no other professional relationship we have experienced comes close to the exceptional level of service, care and attention we have received over the years and continue to enjoy today.Last, but certainly not least, a very special mention must go to the lovely Louise, the office manager. Nothing is ever too much trouble, and we never have to ask twice! The moment something is mentioned, Louise is on the case, ensuring everything is dealt with promptly and efficiently, always with a friendly and helpful manner.A heartfelt thank you to Simon and Louise for 32 years of outstanding service. It is very much appreciated, and we couldn't recommend them more highly.

Have you seen the outcome you were hoping for?

Yes, definitely

What could they have done better?

Nothing

Review from Verified Client

Worcestershire | September 2026

5 out of 5

Advice:
Service:
Value:

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

Large inheritance

How has Simon helped you?

Dear Sir/Madam I have been genuinely delighted by the investment returns Temple Bar has achieved for us, particularly over such a short period of time. The results have been impressive, but just as important to me is the disciplined thinking behind them.Coming from a medical background, I am accustomed to the importance of making an accurate diagnosis before deciding on the appropriate treatment. You look carefully at the evidence, distinguish the underlying condition from the symptoms, and only then determine the right course of action.That is perhaps the best way I can describe my experience of Temple Bars approach to investing. There is a similar emphasis on diagnosis: understanding what a business is really worth, identifying where the market may have misjudged it, and then acting with conviction when the evidence supports that conclusion.Seeing that disciplined approach translate into such strong returns in a relatively short space of time has been extremely rewarding. As both a client and a spouse, I have had a particularly close view of the care and thought that goes into the process, and I couldnt be more pleased with the results.

Have you seen the outcome you were hoping for?

The outcome has exceeded what I was hoping for.

What could they have done better?

I can’t see how they could have done better.

Review from Verified Client

Worcestershire | September 2026

5 out of 5

Advice:
Service:
Value:

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

Imminent retirement followed by an inheritance.

How has Simon helped you?

We have been recommended to Temple Bar from a close friend who has been through difficult times but fortunately had Temple Bar at the helm to guide them through. We are now 19 months in with Temple Bar and quite simply delighted with our experience. The wealth of experience and technical knowledge is communicated in an easy, relaxed and reassuring manner. As we move forward, we feel increasingly confident that we have found the right person and the right firm to help us achieve our goals.

Have you seen the outcome you were hoping for?

The outcomes have considerably exceeded the hoped for outcomes.

What could they have done better?

It's difficult to see anything that could have been done better to be honest.

Review from Verified Client

Worcestershire | August 2026

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Simon has been our financial adviser for 30 years

How has Simon helped you?

Simon has always emphasised that his approach to financial planning is focused on the medium to long term, and that philosophy has remained consistent from our earliest days working together through to today, as we approach retirement.Over the years, the results have far exceeded what was originally promised, but just as importantly, Simons advice has remained robust, practical and grounded in unwavering common sense.More recently, during a review, we once again experienced the real value of that approach: clear, practical advice based on sound common sense and a genuine understanding of our long-term goals. After so many years, that consistency and reassurance continue to be hugely valued.

Have you seen the outcome you were hoping for?

Outcomes have consistently exceeded our expectations

What could they have done better?

nothing

Review from Verified Client

Worcestershire | August 2026

4.7 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★☆

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

I have always relied on the advice of a professional financial advisor regarding investments

How has Simon helped you?

I transferred to Simons business in 2023 as I wanted a more locally based advisor. I consulted reviews from clients before making my choice

Have you seen the outcome you were hoping for?

Yes- its a professional service but is conducted also with courtesy and consideration

What could they have done better?

Nothing comes to mind

Review from Verified Client

Worcestershire | August 2026

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Initially, we were looking for an adviser to help us bring some clarity and structure to our financial planning, particularly, due to running our own business, we had more complex financial decisions to consider. As our circumstances developed, and especially when we started a family, having the right advice became even more important.I wanted to make sure we were making sensible decisions not just for the business and our finances at that point in time, but with the bigger picture in mind. Having someone I could trust to provide clear, practical guidance gave me reassurance that we were planning properly for the future while

balancing the changing priorities that come with family life and running our own business.

How has Simon helped you?

Over the many years we have worked with Simon, I have always valued the clarity and reassurance he brings to financial planning. His advice has never been about short-term reactions, but about keeping sight of the bigger picture and making sensible decisions for the future.As we now approach retirement, I can really appreciate the value of that consistency. Simons advice has been practical, considered and straightforward throughout, and the results over the years have exceeded what we could reasonably have expected.Our more recent reviews have reinforced that confidence. Simon continues to offer thoughtful, common-sense guidance that makes even important financial decisions feel clear and manageable. For me, that sense of trust and reassurance has been every bit as important as the financial results.

Have you seen the outcome you were hoping for?

Yes, absolutely. Over the years, the advice Simon has provided consistently resulted in positive outcomes and has given me confidence that we are making the right decisions for our circumstances.One of the things I have particularly valued is the way any changes in regulations, and the potential impact they may have on myself as well as the family, have always been clearly communicated. This has meant I have been able to understand what those changes mean in practical terms and make informed decisions without unnecessary concern.Overall, the advice has delivered the outcomes I was hoping for, while providing the clarity and reassurance that comes from having a trusted adviser who keeps us informed and focused on the bigger picture.

What could they have done better?

Absolutely nothing. Throughout the time we have worked together, the advice and support have always been clear, considered and appropriate to our circumstances. The consistency, professionalism and the personal approach have been exactly what I would hope for from an adviser, so there is genuinely nothing I feel Simon could have been done better.

Review from Verified Client

Worcestershire | July 2026

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Advice to ensure that my financial funds and pension were well managed and prepared to cope with my wife's demential

How has Simon helped you?

Simon, has asked me to repeat my comments made during a recent invitation to a review as I wanted to ensure my feeling recorded: "Following on from our telephone conversation, thank you for the offer of a review but currently this is not required as Simon has been offering advice almost throughout the year". We have been happy clients from the inception of our relationship and have enjoyed reviews and updates throughout this time. More recently in perhaps one of the most difficult years we have known, Simons advice has been constant and ongoing, and we could not ask more! RegardsMike

Have you seen the outcome you were hoping for?

Very comfortable that advice given has been right for the challenges retirement and advancing years have occurred

What could they have done better?

No obvious areas

Review from Verified Client

Worcestershire | July 2026

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We have nothing but praise and admiration for Simon and his team in looking after us over the last 25 years, We have encountered a number of issues where Simons advise has been indispensable in pointing us in the right direction- As a family we have had to deal with elderly parents, employment, self employment and now verging on retirement there is no financial issue that cannot be resolved by Simons team- caring, understanding, prompt and the utmost customer care comes as a rarety theses days. You will not go wrong in choosing Simon's team for advise.

How has Simon helped you?

We have received exceptional service since the inception of our relationship in 2011 through to 2026. Throughout this period, the professionalism, responsiveness, and commitment to delivering outstanding results have been consistently impressive.It has been a pleasure

working together, and we greatly value the support and expertise provided over the years. Long may this successful partnership continue.

Have you seen the outcome you were hoping for?

absolutely

What could they have done better?

nothing, everything has been spot on over the last 20/25 years

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Review from Verified Client

Surrey | June 2026

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

How has Simon helped you since your last review?

The annual review with Simon was an opportunity to reaffirm my current risk rating and begin thinking about options for the pension element within my account. Simon also advised on the value of POAs both of which are now in progress via Temple Bar.

Review from Verified Client

Cheshire | May 2026

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Advice from my mother.

How has Simon helped you?

To put my savings into accounts that are now making me money.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing.

Review from Verified Client

Worcestershire | February 2026

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Dissatisfaction with the way my pension was set up and monitored

How has Simon helped you?

His advice has been very helpful, and definitely pointed me in the right direction. He has provided good advice on my pension investment , and advised on any change needed to gain the best return from the pension fund.

Have you seen the outcome you were hoping for?

Definitely yes.

What could they have done better?

No specific aspects.

Review from Verified Client

Worcestershire | December 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

I had an advisor who had lost interest in me. Simon came through my accountants recommendation.

How has Simon helped you?

Simon has guided me through the pensions minefield with excellent advice expertly tailored to my specific requirements, as well as finding a safe and productive home for my investments. He continues to offer detailed help and advice.

Have you seen the outcome you were hoping for?

Most definitely.

What could they have done better?

I honestly can't think of any way that Temple Bar could improve its service.

Review from Verified Client

Suffolk | December 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

My late mother's will was written to provide a lifetime trust for my father in the event of him selling their farm which he did when the farm became too much for him in his latter years.

How has Simon helped you?

Dear Sir/MadamI write this review at the request of Temple Bar IFA Ltd as a record of our involvement. We were first introduced by our solicitor in 2017, eight years ago. We were the trustees of a Will Trust and required investment advice in compliance with the Trustee Act and in order to facilitate income for my aged father, who has now passed. I wanted to express my views that the initial advice and review have proved to be excellent. The passing of a loved one is difficult for all. During this period Temple Bar and their support staff could not have been more compassionate and supportive.

Have you seen the outcome you were hoping for?

Yes the outcome has turned out better than I hoped.

What could they have done better?

I do not feel anything could have been done better Simon is an exceptional financial adviser.

Review from Verified Client

Shropshire | November 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

An abundance of caution and retirement planning.

How has Simon helped you?

I have known Simon for many years, both personally and professionally. As a former financial adviser, I am extremely selective about who I trust with my own affairs. When I left the industry, there was only one person I felt completely confident entrusting with all of my personal financial planning, Simon Mansell and his firm Temple Bar Independent Financial Advice Limited and his Estate/Trust/Will Planning firm Temple Bar Estate Preservation Limited.This was not a blind judgement, but one informed by my own working knowledge of the profession and a first hand appreciation of Simons integrity, technical ability, and exceptional work ethic. His advice has always been thoughtful, thorough, and firmly grounded in what is best for his clients. I recommend him without hesitation.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

N/A

Review from Verified Client

Gloucestershire | November 2025

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Someone who was an expert in their field

How has Simon helped you?

We were first referred to Temple Bar by an existing happy client. This was many years back and over those years we have both embarked on our pension planning and retirement planning with Temple Bar. We have Offshore Investment Planning, Wills, Powers of Attorney and Trust/Estate Planning. We have never had one cause to fault anything we have done. Would we do anything differently? Not one thing! In an age of impersonal service, call queues and answer phones Temple Bar is the antidote. A special thank you to Louise who runs the back office with an attention to detail seldom seen - she gets things done.

Have you seen the outcome you were hoping for?

100% yes

What could they have done better?

Absolutely nothing

Review from Verified Client

Worcestershire | November 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Pending budget and age .

How has Simon helped you?

Dear readerWe have dealt with Temple Bar IDA Ltd for many years. The one time we make the mistake of venturing outside of their protection we became embroiled with rogues and complaints to the regulators. Thereafter it was Temple Bar to whom we returned for help who were magnanimous" in their response and who who put us back on the straight and narrow. Thus, we have had experience of poor advice and good advice and can say with experience that Temple Bar Independent Financial Advice Limited should be your first choice. We consider this firm to be worthy of consideration by all those who are looking for quality advice.

Have you seen the outcome you were hoping for?

Yes thanks to temple bar

What could they have done better?

Nothing as Simon and his staff went over and above to fulfill my requirements

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Review from Verified Client

West Midlands | October 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Needed a good home for some money.

How has Simon helped you?

Our relationship with Temple Bar began back in 2001, over twenty-four years ago, which shows these comments are far from a fleeting impression. Across that entire period we have invested, sought advice, and consistently enjoyed exceptional results. In recent years the support has evolved naturally into more complex estate planning, handled with the same care, clarity, and intelligence that first won our trust.I genuinely doubt our experience could have been better in any respect. We feel enormous gratitude.One small example that captures the service perfectly. When I was struggling in exasperation with a set of HMRC forms, I sent a single email to Temple Bar. Within minutes I received a call, straightforward guidance that resolved everything, and a written follow-up confirming what had been discussed. That level of responsiveness and professionalism has been our experience time and time again.So thank you once again to the entire team. If anyone reads this and decides to place their confidence in Temple Bar, you will be in the very best of hands.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing that I can see.

Review from Verified Client

Worcestershire | October 2025

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Simon has been our financial advisor for many years and has always looked after our financial health.

How has Simon helped you?

Most recently pension advice as we plan for the future. Simon is also easy to contact whenever we have any questions or concerns.

Have you seen the outcome you were hoping for?

Yes. Everything has been explained; we can understand the different pensions we hold and where possible they have been combined into one scheme which we can see has been growing steadily, which is very reassuring.

What could they have done better?

Cannot think of anything

Review from Verified Client

Worcestershire | October 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

A friend recommended Simon a few years ago and he has advised me on several matters over the years. i get a first class service from both Simon and his staff

How has Simon helped you?

advised on my pension and having taken the advice given i have been very pleased so far.

Have you seen the outcome you were hoping for?

Oh yes indeed I'm very pleased with the outcome

What could they have done better?

I don't think so, having worked for a global company for over 25 years with their motto right first time. Simon and his staff have my vote every time.

Review from Verified Client

Worcestershire | September 2025

★★★★★ 4.7 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★☆

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

I was dissatisfied with my previous advisors and I had some pensions maturing. Simon came highly recommended by a friend.

How has Simon helped you?

Simon has advised on options for transferring some pensions and for investing saving to create retirement income. He has also offered advice on power of attorney and future inheritance planning.Unlike previous advisors I have found Simon and his assistant Louise very easy to deal with. Things were explained in terms I could understand and everything was expediated swiftly. They were always accessible and answered my queries very quickly.

Have you seen the outcome you were hoping for?

It is too early to judge investment outcomes as they have only been in place for a few months but I am confident in Simons advice and abilities.

What could they have done better?

If the question is what could Simon do better it's hard to fault the service I have recieved.

Review from Verified Client

Worcestershire | August 2025

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

For a number of years, my family and I have benefitted from Simon's sage advice regarding pension planning, investments, power of attorney, wills, estate structuring and trust planning.

How has Simon helped you?

Yet again, Simon has proven to be an exceptional adviser. Recently, with patience and compassion, Simon has guided my brother and I through the process of managing our late fathers estate. During this time, Simons depth of knowledge, professionalism and warm personal approach has helped us smoothly and successfully navigate what could have been a difficult path. He has explained every step with clarity and care, helping us confidently make well informed decisions.Huge thanks must also go to Louise who has been (and continues to be) an outstanding support throughout the process. Louise is incredibly organised and wonderfully efficient, her attention to detail is second to none! Her friendly communication and speed in responding to queries is excellent, nothing is ever too much trouble.Together, Simon and Louises expertise and support have been invaluable.For outstanding service, look no further.what a team!

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing at all!

Review from Verified Client

Worcestershire | August 2025

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Illness within the family which is impacting on our finances

How has Simon helped you?

Without going into personal details on a public forum what I am able to say is that my wife and I have been clients for many years and now in difficult time we continue to enjoy invaluable help. My adviser tells me the regulator now records Consumer satisfaction and with this in mind I wanted to make it known that we consider ourselves to be fortunate in our association with Temple Bar.

Have you seen the outcome you were hoping for?

yes

What could they have done better?

nothing

Review from Verified Client

Worcestershire | July 2025

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

I have known Simon for many years and he has always looked after my pensions and investments and written our wills.He has also put our house in trust and power of attorneys

for health and finances

How has Simon helped you?

On this occasion I was in need of proof of my tax free pension sum which I cashed in to help my step daughter to get on the property market.Her solicitor required proof of payment and as I had no paperwork I asked Simon if he could supply this.

Have you seen the outcome you were hoping for?

Simon sorted this out within 24hrs with no fuss or hassle and sent me all the documents I requested by email so I could quickly send it over.

What could they have done better?

Nothing, he works to such a high standard and I am always grateful to him and his team.

Review from Verified Client

Warwickshire | July 2025

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We realised that as we got older we needed more rounded advice on a myriad of financial subjects.

How has Simon helped you?

Dear Sir/MadamI just wanted to record my finding. Without forewarning I presented Simon with and extensive set of circumstances and I wanted to record that all aspects were covered and answered to my entire satisfaction. I now have a better understand of trust planning and my options for wealth transfer.

Have you seen the outcome you were hoping for?

Yes, very much so.

What could they have done better?

Nothing

Review from Verified Client

Gloucestershire | June 2025

4 out of 5

Advice:
Service:
Value:

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

I needed some help with the above.

How has Simon helped you?

I have held investment with Temple Bar for 10 years and more. All have exceeded their benchmarks and so too their customer service. I recently had cause to doubt HMRC and requested help from Temple Bar. Their response was immediate which included drafted templates and calculation. Temple Bar have met and exceeded my expectations.

Have you seen the outcome you were hoping for?

Im sure this will flow through.

What could they have done better?

Nothing, always a first class practical response.

Review from Verified Client

West Midlands | June 2025

5 out of 5

Advice:
Service:
Value:

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

My parents took advice regarding trustees, power of attorney and executors for myself and brother a few years ago - the help and support and wealth of their experience was endless and still is to this day

How has Simon helped you?

In matters concerning my elderly mother and the ongoing planning related to her well-being, I wish to formally record the following observations:Financial Planning, Estate Planning, Attention to Detail, and Immediate Response Times have all been excellent and without fault. The support and guidance received in these areas have consistently met the highest standards of professionalism and reliability.My family and I consider ourselves privileged to have met

with and experienced such excellence. The peace of mind and clarity provided during this important time have been invaluable.

Have you seen the outcome you were hoping for?

I am still getting the help from both and very grateful to this day

What could they have done better?

Nothing- it is the best support I have had for a long time

Review from Verified Client

Worcestershire | March 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Advice on pension drawdown

How has Simon helped you?

Clarified 'next steps'

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Shropshire | February 2025

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Help with financial planning. Our previous adviser let us down.

How has Simon helped you?

Vouchedfor

Dear Sir/Madam and to whom it may concernWe wanted to record our experience with Temple Bar IFA, their advice, their performance and the administration. We first met with Simon Mansell in 2008. We had had poor service form our former adviser and were sceptical. Over the past 17 years we have received exemplary service and annual reviews. The portfolios in place have given excellent returns. Of great interest is that our advice has also covered estate, tax and trust planning. We would also like to express a special mention about the back office staff and the delightful Louise who is one in a million, calls are always answered and if missed, returned. In an age of call queues and answer phones this is a breath of fresh air. We can only judge as we find and in 17 years we have never had cause to complain or worry. RegardsMark & Joan Ryana

Have you seen the outcome you were hoping for?

Yes and more.

What could they have done better?

Provided choccy biscuits with our coffee at our annual review?.

Review from Verified Client

Worcestershire | February 2025

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To consolidate a number of Pensions that were scattered around a number of Employers. Bring into a Central Portfolio and Invest via the Quilter Platform.All good and my expectations have been exceeded within the chosen risk levels against the Prtfolio

How has Simon helped you?

I have been a client of Temple Bar since 2011 and they do what its says on the tin. My portfolios have performed exceptionally, the client service is exceptionally good and the ongoing advice adapts to the the intrusions and aggressive tax onslaughts from government. We have recently conducted our annual review and yet again all of the expectations have been exceeded.

Have you seen the outcome you were hoping for?

The outcome has out performed the General Market levels. Excellent

These reviews have been independently verified. The overall rating includes client reviews and prospective client first impressions. Last updated: November 2026

What could they have done better?

Just keep up the Good Work

Review from Verified Client

Worcestershire | December 2024

5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Estate Planning and Pension Planning

How has Simon helped you?

I was referred to Temple Bar Independent Financial Advice Ltd in 2017 by a close friend who I know and trust. We embarked upon Estate Planning and Pension Planning and each year I am invited to an annual review. I have been quite relaxed over these review because my financial planning is robust and does not require constant adjustment. I recently accepted a review invitation and completed a new Risk Assessment which has resulted in an adjustment. In addition and outside of the technical areana, I was grateful to be the beneficiary of some "common sense" which has helped me evaluate several issues I was perplexed over.

Have you seen the outcome you were hoping for?

yes Simon was very helpful and gave me good advise.

What could they have done better?

Nothing the office is always helpful and gives good advice.

Review from Verified Client

Worcestershire | September 2024

5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

The wish to plan successfully for retirement

How has Simon helped you?

We have dealt with Temple Bar since 2009 as trustees of my late parents and more recently in our own personal capacity. From start to date we are unable to find fault with the service standards displayed by this firm which are excellent.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Warwickshire | August 2024

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My late Mother needed help with sorting her finances and Simon had been recommended to her .

How has Simon helped you?

We first started dealing with Temple Bar in 2016 in our capacity as trustees for my late mother. During that time all parties have benefited from the clarity of advice received. My mother took great comfort from her dealings with Simon and now that she has passed we are looking to our own financial affairs with the same group.

Have you seen the outcome you were hoping for?

Not entirely, as our dream was to purchase a smaller second residential property for the family , however Simon has brought us up to date with the current market situation , explaining the positives and negatives following a change of government which has now altered our long term views .

What could they have done better?

Nothing to improve as a financial adviser.

Review from Verified Client

Powys | August 2024

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Circumstances

How has Simon helped you?

We have used Temple Bar IFA Ltd since 2013, following an introduction from our family solicitor. We have been extremely happy with this firm. To express this in another way we consider Temple Bat not just our financial adviser but our "adviser". Recently we were the subject of scam call and our first port of call for advice was Temple Bar. Immediately they offered advice and remedial action. Thank you Temple Bar, you are always on call and instructing you as our advisers was one of our better moves.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Worcestershire | July 2024

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Pension advice

How has Simon helped you?

We have been clients of Simon Mansell of Temple Bar IFA Ltd for many years and have taken and followed his advice over life pensions and investments and further over Will Planning and Powers of Attorney. On the basis of our findings and entire satisfaction we have been happy to recommend Simon to friends and family all of whom have repeated our experience. Temple Bar have contacted us every year, sometimes twice yearly on my and my husbands birthdays with the offer of a financial review. Throughout the year we are also contacted with topical news bulletins on those areas of more general interest. At times of worry and concern when investment markets were turbulent we were always counselled with his consistent message, investments are a "marathon not a sprint" and indeed this has proven to be the case. We feel

we have been well and consistently advised.

Have you seen the outcome you were hoping for?

So far so good

Review from Verified Client

Worcestershire | July 2024

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

To consolidate all my various Company Pensions into One manageable Portfolio and Plan for my Retirement

How has Simon helped you?

Since 2011 with Simon and Louise I have had every faith in Pension Planning for the Future which is here Today, Solid professional advice and simplify a myriad of difficult pensions which I did not understand.Also two Powers of Attorney both Fiscal and Health are now in place to set my mind at ease into the future. When recently taking a Lum Sum both He and Louise made the transition seamless and easy, All Good

Have you seen the outcome you were hoping for?

Yes, The outcome has resulted in a 100% Satisfaction

What could they have done better?

Im unable to think of anything that would have been better, Keep up the Good Work

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Review from Verified Client

Worcestershire | July 2024

★★★★

87l-2.348,9.1a1.447,1.447,0,0,0,2.172,1.593l7.813-5.062a1.362,1.362,0,0,1,1.541,0l7.848,5.062a1.447,1.447,0,0,0,2.172-1.593l-2.348-9.062A1.462,1.462,0,0,1,225.52,19.761Z" transform="translate(-199.939 0)" fill="#4BC1CA" /> 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

I have dealt with Simon regarding pensions and financial planning since 1988 and have found his advice invaluable. I trust Temple Bar completely and during a recent financial review, Simon discovered that a critical illness life policy which I have owned for many years was payable to me in full due to a recent illness that i had suffered. Had I not had this review with

Simon I would never have known about this and I received a substantial sum as a result.

How has Simon helped you?

I have recently become the beneficiary of a substantial payment facilitated through Simon Mansell of Temple Bar IFA Ltd. I want to share with the reader my exceptional experience in dealing with this exceptional firm.Firstly, I owe a debt of gratitude for their insightful advice. Secondly, I appreciate their persistence in ensuring I participated in regular reviews, which I might have neglected on my own. Thirdly, I commend the tenacity of Temple Bar and their staff, particularly the highly efficient office manager Louise, in pursuing my claim.A special note to the reader: As a director of my own Limited Company and with a lifetime of experience dealing with customers and suppliers, I can confidently say that the services provided by Temple Barfrom Life Insurance, Pensions, and Investments to Estate Planningare exemplary. I consider myself fortunate to have encountered such a high level of excellence.If you are contemplating a new adviser, I can only share my experience: I have found a rare commodity in Temple Bar, and that commodity is excellence. I hope you recognise the potential value on offer from Temple Bar and the value they could offer you and your family.Warm regards,MARK

Have you seen the outcome you were hoping for?

Yes 100%

What could they have done better?

Nothing at all

Review from Verified Client

Gloucestershire | April 2024

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needing to understand the part-withdrawal options from my current investment.

How has Simon helped you?

Simon was able to explain patiently the mechanics of this and implement the agreed course of action.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing.

Review from Verified Client

Worcestershire | February 2024

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

To consolidate various Pensions into one manageable portfolio

How has Simon helped you?

In Pension Planning for the Now Future which is here Today, and sound professional advice from a continued difficult to understand financial pension industry

Have you seen the outcome you were hoping for?

Yes, Results have been very good and reached my expectations

What could they have done better?

Nothing, Keep up the Good Work

Review from Verified Client

Worcestershire | December 2023

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Simon has been our advisor for many years. We had no hesitation in contacting him for further advice regarding pensions and investment of an inheritance.

How has Simon helped you?

Simon listened to our issues and presented us with clear options. Everything has been clearly explained and any queries answered.

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

Worcestershire | November 2023

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

needed advice on obtaining funda for an operation.

How has Simon helped you?

contacted one of my one of my investment companies to obtain funds.

Have you seen the outcome you were hoping for?

yes.

What could they have done better?

nothing excellent service.

Review from Verified Client

Worcestershire | November 2023

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

improvement of investments

How has Simon helped you?

good advice and prompt service

Have you seen the outcome you were hoping for?

not yet to soon

Review from Verified Client

Surrey | November 2023

5 out of 5

Advice:
Service:
Value:

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

The time had come to seek expert advice about pension and investment management

How has Simon helped you?

Simon assisted with consolidating my pension arrangements and transferring my ISA portfolio

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Worcestershire | November 2023

5 out of 5

Advice:
Service:
Value:

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

Investment

How has Simon helped you?

Added to existing investment

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Worcestershire | September 2023

5 out of 5

Advice:
Service:
Value:

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

I have known Simon for many years and he has been advising me during that time

How has Simon helped you?

Simon has sorted out all my pensions into one and also helped my wife and I to put our house in trust for the children's future.when we decided to do that we also got new wills done along side 2 sets of powers of attorney one for health and the other for finance.

Have you seen the outcome you were hoping for?

It took 7 months to sort out all of them, but it was always under the control of Simon and Louise and went very smoothly and we know have total peace of mind.

What could they have done better?

Simply nothing.

Review from Verified Client

Gloucestershire | September 2023

4.3 out of 5

Advice:
Service:
Value:

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

Financial planning and long term care.

How has Simon helped you?

Simon continues to advise in a professional manner in the direction we need to go .He always gives an honest approach to the issues that need addressing.

Have you seen the outcome you were hoping for?

Yes we have but unfortunately the world has somewhat had an impact.

What could they have done better?

Nothing.

Review from Verified Client

Worcestershire | August 2023

5 out of 5

Advice:
Service:
Value:

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

Inheritance of parents estate, the need to consider ahead of time possible long term care and investments and savings.

How has Simon helped you?

Provided clarity and evaluation of options to allow informed decisions to be made.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Very little.

Review from Verified Client

Gloucestershire | August 2023

5 out of 5

Advice:
Service:
Value:

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

Looking for long term investment, inheritance and will planning. Long term care for grand parents etc

How has Simon helped you?

We looked into all aspects and prefered ways to invest, will planning and asset protection.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing, we continue to monitor all aspects and get great advice from Simon.

Review from Verified Client

Worcestershire | July 2023

4.3 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★☆☆

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

we were recommended to him several years ago

How has Simon helped you?

pensions and investments

Have you seen the outcome you were hoping for?

yes, before stock market fall.

What could they have done better?

nothing

Review from Verified Client

Gloucestershire | July 2023

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Pension for retirement

How has Simon helped you?

Simon has been very honest & all advice given has been appropriate to my needs

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Worcestershire | July 2023

4 out of 5

Advice:
Service:
Value:

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

My late husband used Simon's company for financial advice with his pension and investments

How has Simon helped you?

Simon has been so helpful and professional helping sort out all my financial dealings after my husband recently passed away

Have you seen the outcome you were hoping for?

So far yes

What could they have done better?

I don't know how

Read more reviews at
https://www.vouchedfor.co.uk/financial-advisor-ifa/worcester/029071-simon-mansell/reviews

Review from Verified Client

Herefordshire | July 2023

5 out of 5

Advice:
Service:
Value:

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

I have been a client of Simon;s for many years I did not need to look for anyone else

How has Simon helped you?

By giving me good sound advise

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Worcestershire | July 2023

5 out of 5

Advice:
Service:
Value:

How has Simon helped you since your last review?

Still have a very high regard for the services he gives

Review from Verified Client

Worcestershire | June 2023

5 out of 5

Advice:
Service:
Value:

How has Simon helped you since your last review?

Simon always answers any questions we have , always giving sound advice in timely fashion and in a comprehensive understandable manner however complex the questions and governing laws may be

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Review from Verified Client

Worcestershire | June 2023

4.7 out of 5

Advice:
Service:
Value:

How has Simon helped you since your last review?

Good advice

Review from Verified Client

Worcestershire | June 2023

5 out of 5

Advice: 5 stars

Service: 5 stars

Value: 5 stars

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

Word of mouth

How has Simon helped you?

Sorted out my dad's investments and my husband pension

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Only on medium risk so no

First impression from a user who is not yet a client

May 2023

5 out of 5

Please provide a brief comment about your experience with Simon

Very good advice and highly experienced

Review from Verified Client

Worcestershire | May 2023

5 out of 5

Advice: 5 stars

Service: 5 stars

Value: 5 stars

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

Needed advice on a personal pension

How has Simon helped you?

Simon has given me good sound advice, which was very useful

Have you seen the outcome you were hoping for?

Yes I am much better informed to make decisions

Review from Verified Client

Swansea | April 2023

★★★★★ 4.7 out of 5

Advice: ★★★★★
Service: ★★★★☆
Value: ★★★★★

How has Simon helped you since your last review?

He has kept us up to date with all of the market developments regarding our investments.

Review from Verified Client

Worcestershire | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

needed to access my old pension pots.

How has Simon helped you?

he has given advice regarding moving my pension pots to a better investment

Have you seen the outcome you were hoping for?

it was only done this week, so not yet

What could they have done better?

nothing - it was all great

Review from Verified Client

Worcestershire | January 2023

5 out of 5

Advice:
Service:
Value:

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

To support and inform me with the best options regarding the future long term care of a family member.

How has Simon helped you?

Simon has expertly advised my family and I for a number of years covering the many complex areas of pensions, mortgages, investment planning, inheritance planning and long term care. Simon has suggested the necessary options both clearly and concisely. He is always at the end of the phone or an email to address concerns or thoughts, indeed he has the patience of a saint! I would whole heartedly recommend Simons professionalism and financial expertise.

Have you seen the outcome you were hoping for?

The process is on-going but we now have a more confident and informed approach as to the best and most favourable route forward.

What could they have done better?

Nothing. Exceptional commitment, attention and care from both Louise and Simon.

Review from Verified Client

Worcestershire | November 2022

5 out of 5

Advice:
Service:
Value:

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

inhertitance and investment planning following an unexpected death of a family member- Simon was recomended to us by a friend

How has Simon helped you?

Simon has been extremely supportive, very knowledgeable and offered timely expert advice at a very sensitive time. The service Simon provided was independant and reasuring throughout and we were fully allowed time to digest information and ask further questions - which we

still do now- and still recieve the high level of service we had on introduction.

Have you seen the outcome you were hoping for?

Yes the outcome and service we have recieved have been second to none

What could they have done better?

In a word -Nothing.

Review from Verified Client

Shropshire | October 2022

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

To help me through the minefield of personal financial planning.

How has Simon helped you?

I am writing this review based on my experience of Temple Bar IFA Ltd and in particular Simon Mansell. I first place pension business via Simon in 1987, and over the 35 years I can report a level of service nothing short of excellent. Those plans have come to fruition and I now enjoy a portfolio that is able to sustain me in my retirement. This excellence of the service proposition remains as high today as it has been every year.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

N/A

Review from Verified Client

Norfolk | August 2022

★★★★★ 4.7 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★☆

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

I wanted to investigate what options I had in managing my pension for the future and advice on transferring my existing final salary scheme to a managed fund. Some colleagues had also used Simon and recommended him to me.

How has Simon helped you?

Simon has been thoroughly professional and understood my needs. He has explained options and each step of the process really clearly and been available to help or answer questions throughout. His expertise in this field has been invaluable and I would recommend him to anyone looking for support with pensions.

Have you seen the outcome you were hoping for?

The initial transfer has been completed. Louise has been fantastic at chasing and keeping me updated at regular intervals to see this get over the line. I now look forward to seeing my investment grow!

What could they have done better?

Nothing.

Review from Verified Client

Worcestershire | July 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted someone to point the way ahead with my pensions and future earnings as I was only 28 at the time .

How has Simon helped you?

I first met Simon in 1988 when I started a small pension. Life and events meant we lost contact other than a few brief periods where advice was sought and always forthcoming. However Simon always maintained contact. More recently I wanted to amalgamate my affairs in my retirement and ensure my wife Christine would be best placed should premature death overtake. This involved the analysis of several pensions and a move into more suitable retirement vehicles. However, Ukraine exploded and markets became volatile. Simon immediately placed matters on hold rather that pursue switches that exposed us to risk in times of volatility. These changes have now been activated with a most satisfactory result. Our experience has been and continues to be positive and my wife and I are happy that this

testimonial stands as evidence of a professional adviser that serves his clients for the long term.

Have you seen the outcome you were hoping for?

The whole outlook now is much better as lots of different pension plans are now in a much better plan and the the others are on a set time table to be taken out at my retirement age in 3.5 years should I wish.The protection this gives to my wife should I die first can't be under estimated and give's me peace of mind that she will get all the money and not lose it thought taxes.

What could they have done better?

Nothing really having completed what they stated from day one.

Review from Verified Client

Shropshire | July 2022

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

The financial nightmare of 2008.

How has Simon helped you?

Got us back on track ie Wills, POAs, Investments, Pension & Trust. Simon and Louise are easily available and nothing is to much trouble.

Have you seen the outcome you were hoping for?

Yes and more.

What could they have done better?

We would have liked chocolate hobnobs with our coffee?.

Review from Verified Client

Worcestershire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

To help organise my mother's financial affairs, following the sudden passing of my father

How has Simon helped you?

Simon provided extensive advice that was pertent to my mother's situation

Have you seen the outcome you were hoping for?

Absolutely

Review from Verified Client

Worcestershire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Asset Protection

How has Simon helped you?

Simon offered financial solutions to future proof assets with valuable returns

Have you seen the outcome you were hoping for?

Yes the portfolio is performing very well

What could they have done better?

Nothing the service has been very professional and all questions are answered in a timely manner

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Review from Verified Client

Shropshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

We wanted someone to talk to about options and be able to highlight any risks in the ideas which we had.

How has Simon helped you?

Simon has a great approach, he was able to understand our needs and motivations quickly to present us with options to move forwards. He was also able to easily explain the legal wording making the whole process stress free.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Shropshire | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★> ★

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

Mainly to seek advice that would safeguard my families future and protect my savings

How has Simon helped you?

Simon has always given very good advice. This has helped me grow a good portfolio that has been future proof even in market downturns. I would recommend Simon, hes knowledgeable in all areas of financial planning. My family also use Simon.

Have you seen the outcome you were hoping for?

The advice and outcome is more than satisfactory.

What could they have done better?

I can't think of anything that they could have done better.

Review from Verified Client

Worcestershire | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Many years ago we were looking for help in planning for the future for all the family

How has Simon helped you?

Over the years, Simon has seen us through the planning and now investments and pensions

Have you seen the outcome you were hoping for?

We are pleased with the returns made for our investment and pensions.

What could they have done better?

it was all good

Review from Verified Client

Staffordshire | February 2022

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Simon was my mums financial adviser, he helped her with investments and inheritance planning

How has Simon helped you?

Simon and Louise have been amazing since we lost mum in helping my brother and I sort out her investments. Excellent advice to mum about investing her money, excellent support for the family during a very difficult time.

Have you seen the outcome you were hoping for?

The investments mum made on Simons advice have resulted in high yields and were planned to ensure these were passed onto my brother and I.

What could they have done better?

Nothing, excellent advice and service.

Review from Verified Client

Worcestershire | February 2022

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Being self employed I needed advice on pension planning.

How has Simon helped you?

He has given me advice over many years that has produced excellent results.He is assisted by Louise Plant. She has unfailingly been pleasant, courteous, efficient, very patient with my queries, and has always kept me very well informed.Working together they make a formidable team.

Have you seen the outcome you were hoping for?

Most definitely.

First impression from a user who is not yet a client

January 2022

★★★★☆ 4 out of 5

Please provide a brief comment about your experience with Simon

Very prompt response to enquiry and follow up emails.

Review from Verified Client

Cornwall | December 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed a Trustworthy and Knowledgeable Adviser for my Pension Plans

How has Simon helped you?

To whom it may concern,I first met with Simon in 1989, 32 years ago and I'm still a happy client!. We have pension planning, life and critical illness protection. In 2017 I introduced my mother and father and they embarked upon estate planning so our relationship is now family wide. I anyone reading this is able to look back over so many years then their plans will have stood the test of time as mine have.RegardsDavid

Have you seen the outcome you were hoping for?

Looking good so far

Review from Verified Client

Warwickshire | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

How has Simon helped you since your last review?

Continues to show due care and attention and regular communication. Always at hand to offer finance education, help and support when required

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Review from Verified Client

Gloucestershire | September 2021

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

How has Simon helped you since your last review?

Simon continues to offer unrivalled advise across a range of services. We cannot praise him enough for all the work he has done for us in all the years we have been with him.

Review from Verified Client

Herefordshire | September 2021

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

How has Simon helped you since your last review?

By continuing to be readily available for any ad hoc questions and knowing that Simon will be the person to respond and not some faceless adviser who we had never met.

Review from Verified Client

Powys | September 2021

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

How has Simon helped you since your last review?

Simon has continued to invest my funds for me through the very difficult period of the covid pandemic. The fact I can trust my funds with his office means I'm not worrying about whether my funds are safe or not.

Review from Verified Client

Warwickshire | September 2021

5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

My Mother needed advice and guidance with her investments as they needed professional attention.

How has Simon helped you?

Simon quickly analysed and evaluated Mums finances and put them into a safer area of investment.

Have you seen the outcome you were hoping for?

Have now seen an amazing positive outcome to all areas of Mums financial affairs.

What could they have done better?

Everything found to be very satisfactory so no areas of improvement can be commented on.

Review from Verified Client

Worcestershire | September 2021

5 out of 5

Advice:
Service:
Value:

How has Simon helped you since your last review?

THE PENSION PORTFOLIO CONTINUES TO OUT PERFORM THE MARKET RATE AND EXCELLENT GROWTH IN TRYING RECENT TIMES

Review from Verified Client

Herefordshire | September 2021

5 out of 5

Advice:
Service:
Value:

How has Simon helped you since your last review?

No

Review from Verified Client

Worcestershire | July 2021

5 out of 5

Advice:
Service:
Value:

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

To put our finances in order and plan for retirement

How has Simon helped you?

Dear Simon/Staff I hope those reading this will be encouraged to pursue your financial planning with Temple Bar IFA Ltd and Temple Bar Estate Preservation Ltd both owned and run by Simon Mansell. Hindsight is a wonderful thing, but we have no need of it having experienced a first class service throughout the last 28 years. I wanted to give any prospective clients its benefit of our experience. We first started dealing with Simon in 1993, 28 years ago. Since that time, we have placed protection, investment, Wills, Powers of Attorney and Estate Planning Trusts. I am writing now as a way of thanking Simon and to encourage others from our beneficial experience. As we surrender the first protection plan we find it has not only

protected us but now returns a hansom investment. RegardsAllen & Molly

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

In my view they couldn't have done anything better

Review from Verified Client

Worcestershire | July 2021

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Very bad service by Pension company and bank. Both were not dealing with the issues for 2 years. SIMON resolved it and improved the package they offered

How has Simon helped you?

In September 2020 we asked Simon Mansell of Temple Bar to help us obtain information pertaining to our pension arrangements from Royal London and HSBC Bank. We had previously been struggling with these two organisations and to suggest they were incompetent would be a massive overstatement of their service standards. We instructed Simon Mansell and it was only through his tenacity that we won through, but only at considerable cost to Simon in terms of his time and effort. In summary I would advise any prospective client to avoid dealing with Royal London and HSBC Bank. On the other hand I would strongly recommend using Temple Bar, Simon Mansell and his efficient PA Louise. Regards Ian

Have you seen the outcome you were hoping for?

Yes and a better result

What could they have done better?

Simon and their team were faultless

Review from Verified Client

Worcestershire | May 2021

5 out of 5

Advice:
Service:
Value:

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

Pension transfer

How has Simon helped you?

Following my recent investment review I'm pleased to report that all of my expectations have not only been met but exceeded. My experience has been 100% positive 10 out of 10. I would also point out that this was in spite of the investment period covering 202/21 Covid19 Lockdown. I therefore have no reservations in recommending Temple Bar IFA Ltd.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Swansea | April 2021

4.7 out of 5

Advice:
Service:
Value:

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

The occurrence of my mothers death and her will.

How has Simon helped you?

Hello,I wanted to record my experience of dealing with Temple Bar IFA Ltd and Simon Mansell. I am a Trustee and Contingent Beneficiary of a Will Trust established by my departed Mother. My brother and I were introduced to this firm by our family solicitors in 2017. There are two parts to our investment: Income for my father and capital for the beneficiaries. Our duties as trustees are strictly regulated and I'm reassured by the professionalism and expertise displayed by Temple Bar, especially the guidance offered through the Covid Pandemic. I also want to add, I am astonished by the success of the proposed investment strategy. Thank your

Temple Bar.RegardsJOHN

Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Gloucestershire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Update/Review of my investments

How has Simon helped you?

To whom it may concern, I first dealt with Simon in 1994 and conducted ongoing business from 1997, 1998, 2014 and now 2021. I have just completed the latest element of this ongoing advice programme. Thus, I able to offer this testimonial with 27 years experience. Over these years my experiences have always been positive. Advice has been tailored to my individual circumstances from both an investment temperament, taxation positions and estate planning perspective. I would have not hesitation in recommending Simon Mansell and his team at Temple Bar Independent Financial Advice Limited. Regardslan

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

There is nothing to report

Review from Verified Client

Gloucestershire | February 2021

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Professional advice to ensure we obtained the maximum benefits from our pension funds.

How has Simon helped you?

Simon gave us his advice based on his extensive knowledge.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

No

Review from Verified Client

Powys | January 2021

4.7 out of 5

Advice:

Service:

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

Because I am not qualified in this therefore I go to an expert.

How has Simon helped you?

I have commented before but wanted to confirm that my earlier opinions have not changed and I continue to be pleased with Temple Bar. I say this in a professional capacity where the recommendation of a firm to my own clients carries with it a degree of risk.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing

Review from Verified Client

Worcestershire | January 2021

5 out of 5

Advice:

Service:

Value:

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

My previous IFA retired after i had set up a number of financial arrangements, including Income protection, mortgage, pensions and life assurance. I sat on these for a few years until it became clear that these arrangements needed to be reviewed and if necessary updated, and for this i would need the help from an experienced financial Advisor

How has Simon helped you?

I am what is known as an Orphan client i.e. I have not done business with Temple Bar IFA Ltd but rather been inherited following the loss of my former adviser. The point that I wanted to make is that sometimes advice can take the form of sit tight and use your existing plans rather than embark upon new ones. In this respect I have have not placed new business or been charged an advice fee in spite of taking advice on a number of occasions. I consider this to be a professional approach that fosters good will and when the time comes I will be happy to place business.RegardsIan

Have you seen the outcome you were hoping for?

The advice that Simon is continuing to give me, is i hope guiding me in the right direction, particularly with regards to my pension planning

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Review from Verified Client

West Midlands | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Information and advice on investments and my private pension.

How has Simon helped you?

Quite simply our involvement with Temple Bar IFA Ltd continues to be positive. Our investments have exceeded expectations by a significant margin! This is especially pleasing in 2020 with the backdrop of Covid, the year when the world stopped spinning - a true test of ones metal. Finally, how refreshing to pick up a telephone and speak to real people, the same as we actually did business with!Best regardsDavid and Susan

Have you seen the outcome you were hoping for?

I am very satisfied with the performance he has achieved for me in all areas.

What could they have done better?

As far as I am concerned he has achieved everything I have asked for and would be unable to suggest any extra constructive comments.

Review from Verified Client

Warwickshire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

My parent required help and guidance with her investments

How has Simon helped you?

Simon was able to offer clear and concise instruction as to the next best steps going forward.

Have you seen the outcome you were hoping for?

Completely.All savings and investments are now in order and well organised.

What could they have done better?

No improvement required. Temple Bar offer a first class service and are always on hand to assist as and when required.

Review from Verified Client

Worcestershire | December 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Sale of property

How has Simon helped you?

We act as trustees for my elderly mother having established Estate Planning Trusts in 2018. Everything that Simon predicted has come to pass and we now are benefiting from the estate planning package that has been put in place. We are especially pleased with the investment

returns especially with the backdrop of Covid-19. When we have had cause to ask Simon for help and or advice he and his staff are always on hand, no call queues, no gatekeepers always available. I might add this has proved invaluable and has taken a tremendous stress off our shoulders at a most difficult time.Based on our own personal experience we would have no hesitation in making a strong recommendation of Temple Bar IFA Ltd.

Have you seen the outcome you were hoping for?

Yes trust fund put into place

Review from Verified Client

Herefordshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Dissatisfaction with our previous IFA

How has Simon helped you?

Simon gave us the trust back that we had lost over the previous years. His advice has protected our investments during the turbulent times caused by Covid. This was a pleasant surprise after the constant bombardment of bad news in the media. For my wife and I one of the main benefits of using Simons services is that he knows us. He is almost always available to speak to at short notice and you never have to worry about being passed from one IFA to another as happened with our previous advisory company.Any day to day administration is handled very competently by Louise in the back office and a friendly voice always greets you when you call.

Have you seen the outcome you were hoping for?

Absolutely.

What could they have done better?

Well if he could have suggested investments that quadrupled that would have been good! (said with tongue in cheek)

Review from Verified Client

Herefordshire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Nearing retirement, reviewing my situation and wanting to ensure I understood all of the risks involved with my plans

How has Simon helped you?

My partner and I needed to protect our mortgage. A simple joint reducing term plan had been prompted. However when we invited Simon to advise he went several stages further and was better able to demonstrate the value derived from two single life "level" term plans i.e. where the sum assured did not decrease and where the plans could both be placed in trust. By writing our plans this way we were shown that the Sum Assured could be held in trust outside our estate. Thereafter, there will be no probate delay/cost or inheritance tax liability (IHT) on this sum of money and this sum "will not" be considered part of our estate for the purposes of inheritance tax/long term care. The trustees can pay this money to our respective partner or children. Another option we loved was the ability to retain this money in trust and the trustees could then make interest free loans from the trust fund not only to clear our mortgage but to create a debt against the remaining estate repayable to the trust fund on your spouses death or better still deductible from the estate value for the calculation of inheritance tax, probate and or long term care means-testing or other state benefits. From a simple mortgage protection plan to a complex estate planning package - fabulous!

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing, he was always there to help and advise when it was needed, especially during 2020

Review from Verified Client

Worcestershire | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Financial Advice for Family investments and inheritance

How has Simon helped you?

I have experienced a "very" difficult family situation that required sound, quality and sympathetic advice, all of which we found in our dealings with Simon Mansell of Temple Bar IFA Ltd. I would also like to mention his ever efficient personal assistant Louise. I would have no hesitation in making the strongest thank you and recommendation to any would-be prospective clients.

Have you seen the outcome you were hoping for?

yes, Simon help has been immeasurable

What could they have done better?

No applicable - Simon spent time to listen to our concerns and was able to recommend solutions appropriately.

Review from Verified Client

Worcestershire | November 2020

★★★★★ 4.7 out of 5

Advice: ★★★★☆

Service: ★★★★★

Value: ★★★★★

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

My first contact with Simon was when looking for a pension plan to invest in after becoming self employed.

How has Simon helped you?

Initially Simon led me through my possible options and provided his recommendation of a product that would suit my situation. Recently he has helped amalgamate many of my existing pensions into a manageable fund.

Have you seen the outcome you were hoping for?

In almost 10 years his recommended pension option has outperformed my existing pension portfolio.I am confident that the recent advice given will continue to meet my expectations.

What could they have done better?

Simon continues to give sound financial advice and regular updates. I have no reason to

believe that this situation will change in the future.

Review from Verified Client

West Midlands | November 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

A first time buyer.

How has Simon helped you?

Life insurance advice

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

N/A

Review from Verified Client

Gloucestershire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

Retirement advice & solutions.

How has Simon helped you?

He explained how our current pensions could be amalgamated to fund our retirement & also helped with investments.

Have you seen the outcome you were hoping for?

Due to Covid-19, not yet.

What could they have done better?

Nothing, because everyone is currently living under challenging times. This is of no fault of our Financial Adviser. He is very good at keeping us informed of the current financial situation.

Review from Verified Client

Worcestershire | October 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

To help us plan for the future.

How has Simon helped you?

Simon, always at hand to support, has expertly steered us through our financial planning over the past eighteen years. Over that time, we have acted on his abundant knowledge and advice regarding investment opportunities, pension and estate planning. We are most grateful for his clarity and patience in delivering sound advice. Office Manager, Louise is incredibly efficient, friendly and professional, nothing is too much trouble! We would strongly recommend Temple Bar IFA to any prospective client.

Have you seen the outcome you were hoping for?

Yes and we continue to do so.

What could they have done better?

We could not have asked for more.

Review from Verified Client

Worcestershire | September 2020

★★★★★ 5 out of 5

Advice: ★★★★★
Service: ★★★★★
Value: ★★★★★

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

AMALGAMATION OF SEVERAL PENSIONS INTO A SINGLE PORTFOLIO ALONG WITH INVESTMENT ADVICE AND LONGER TERM FINANCIAL PLANNING

How has Simon helped you?

FROM THE OUTSET THERE WAS SOLID ADVICE ON ALL MY REQUIREMENTS WHICH NOW HAVE ALL BEEN PUT IN PLACE. ALL ITEMS FOR FAMILY ESTATE, FINANCIAL, PENSIONS, INVESTMENTS AND POWERS OF ATTORNEY HAVE PROVED TO BE A SUCCESS

Have you seen the outcome you were hoping for?

YES VERY HAPPY, SIMON AND EXCELLENT SUPPORT FROM LOUISE KEEP ME WELL INFORMED REGULARLY, MY ESTATE IS IN GOOD HANDS

What could they have done better?

NOTHING AT ALL, NO COMPLAINTS, VERY IMPRESSED

Read more reviews at
https://www.vouchedfor.co.uk/financial-advisor-ifa/worcester/029071-simon-mansell/reviews