

MARK BERESFORD

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



Mark Beresford

Buxton Beresford Wealth



Top Rated 2019

4.8 / 5 ★★★★★ 19 reviews

VouchedFor checks:

- ✓ FCA Regulated
- ✓ Recent Client Reviews
- ✓ Independent Financial Adviser
- ✓ Qualifications Uploaded
- ✓ Transparent Fees

Services offered

- ✓ Insurance & Protection
- ✓ Pensions
- ✓ Retirement income (annuities, drawdown)
- ✓ Auto Enrolment
- ✓ Investments and Savings
- ✓ Inheritance Planning

Qualifications listed

Standard Qualifications: 12 Qualifications

CII - J05, Diploma in Pension income options

CII - CF1, Certificate in UK financial services, regulation & ethics

CII - Statement of Professional Standing (SPS)

CII - CF2, Certificate in Investment and Risk

CII - R05 Certificate in Financial Protection

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

Client Reviews

Mark Beresford

Buxton Beresford Wealth



4.8 out of 5

Review from Verified Client

Surrey | June 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Help with pension and investments.

How did Mark help you?

Has given me good advice for years on pensions and investments and had good returns on my money.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Hampshire | May 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★

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

Change in career and wanting to secure a good longer term pension pot

How did Mark help you?

Provided various reviews, recommendations and on-going monitoring of the funds, making changes as our own circumstances changed.

Have you seen the outcome you were hoping for?

Broadly yes - the target growth has been within the target range.

What could they have done better?

eing a little more proactive when sorting out review meetings.B

Review from Verified Client

Middlesex | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Retirement and a need to plan effectively for the future.

How did Mark help you?

Mark provides sound advice without the 'flannel' I have come to expect in this industry. He started by asking lots of questions to understand our needs, plans for the future and aspirations. Once he was clear he understood, he then offered a range of options, helping us to make informed choices. It was al really very straightforward.

Have you seen the outcome you were hoping for?

Yes, we have invested our lump sum to provide a yield regularly for holidays and other desires we have. the investments are doing nicely in a difficult market.

What could they have done better?

Difficult to say. We both felt his approach was excellent and the outcome has been as we wanted.

Review from Verified Client

Surrey | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking for better than bank interest return from our sawing.

How did Mark help you?

5 Star rating given Mark divided very carefully our investment placed them in variety of funds with results of capital growth above bank rates.

Have you seen the outcome you were hoping for?

Yes, we were very pleased with the outcome.

What could they have done better?

Nothing

Review from Verified Client

London | April 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Review of my current financial position

How did Mark help you?

Looked at ways of optimising investments and reducing fees

Have you seen the outcome you were hoping for?

Too early to tell!

Review from Verified Client

Wiltshire | April 2019

★★★★☆ 4.3 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★☆

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

My wife has a pension with assets over 100k which she wished to withdraw tax effectively, yet the pension provider only allowed a single withdrawal.

How did Mark help you?

Mark understood the issue immediately, and having satisfied himself that we retained significant ongoing pension benefits, recommended that we move the funds to a flexible

pension provider.

Have you seen the outcome you were hoping for?

Yes, this is an ongoing process as my wife has income from investments, so only wishes to withdraw funds up to the basic tax ratelimit.

What could they have done better?

Nothing. We had two brief meetings and it was resolved.

Review from Verified Client

Hampshire | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

The attitude of the previous, (introduced by previous employers) became very much about them and not me.

How did Mark help you?

Full review based on changing circumstances, recommendations I could challenge and have explained, rationalisation of portfolio and online portal for visibility.

Have you seen the outcome you were hoping for?

More than happy

What could they have done better?

He could give me the winning lottery numbers in advance!

Review from Verified Client

Surrey | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Preparing for retirement.

How did Mark help you?

Mark Beresford was an inspirational help with our complex family financial affairs. Ranging from resolving long term pension issues to dealing with investment bond advice and realisation. In addition was instrumental in steering us in the best direction with existing Trust and inheritance complications. I have no hesitation in recommending him as highly as possible.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

I cannot think of any need for improvement.

Review from Verified Client

London | April 2019

★★★★☆ 4.3 out of 5

Service: ★★★★★

Advice: ★★★★★☆

Value: ★★★★★☆

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

Death of my husband, needed expert advice on finances.

How did Mark help you?

Mark has been my FA for 15 years and I've stayed with him because he understands how it all works, gives realistic advice and is thoroughly trustworthy.

Have you seen the outcome you were hoping for?

I wanted low risk investments for a steady but reliable outcome and Mark has provided this by spreading the risks over many companies and has chosen these companies well.

Review from Verified Client

Surrey | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed to review my pension and Mark was recommended.

How did Mark help you?

Reviewed my funds.

Have you seen the outcome you were hoping for?

Already yes ! And more.

What could they have done better?

Sound advice indeed from which I've benefited already so, no.

Review from Verified Client

Devon | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

having left the military after a full career and then transitioning into the civilian sector, I was in the position to make small investments and having met mark, he offered straightforward financial advice.

How did Mark help you?

Having initially followed Mark on LinkedIn, we subsequently met at a Chamber of Commerce function, which was the most productive element of the evening. Having recently left the forces and embarking on an employment path in the civilian market with all its subsequent pitfalls, Mark, proffered salutatory and relevant financial advice in a language that was easily comprehensible to someone who had little or no knowledge of how best to financially invest in the future. In the 4 years Mark has acted as my financial advisor, he continues to offer timely and pertinent advice with regular annual meetings to best assess how best to maximise my investments. Would not hesitate and in fact have to recommend him to both college's and friends.

Have you seen the outcome you were hoping for?

my plan is on track as per original expectations

What could they have done better?

Mark, keeps me fully apprised on not only my plan, but also other products he thinks may be of interest. There isn't much more he would be able offer me. More than satisfied with the

service provided.

Review from Verified Client

Surrey | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had a bit of money that I wanted to invest

How did Mark help you?

He went through my needs and expectations and suggested the best way he could help me invest and then implemented it with my approval

Have you seen the outcome you were hoping for?

More or less but Brexit is causing a problem!

What could they have done better?

Nothing

Review from Verified Client

Surrey | April 2019

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Long term client

How did Mark help you?

Reviews my finances each year

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Maybe a little more contact during the year

Review from Verified Client

Hampshire | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My mother passed away

How did Mark help you?

Reviews my pensions and insurances

Have you seen the outcome you were hoping for?

Yes thank you.

Review from Verified Client

Hampshire | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Lost my mother

How did Mark help you?

My Husband and I have been a clients for a year now and have found Mark to be not only a very knowledgable person but very easy to talk to and his advice is honest and forthcoming. Having had previous advisors who seemed more interested in what they earned I now see through the fees disclosure that Mark is a total professional and can be truly relied on to give best advice for you.

Have you seen the outcome you were hoping for?

Yes. Very good.

Review from Verified Client

Hampshire | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Not happy with previous company

How did Mark help you?

Good sound advice. Good return on investments.

Have you seen the outcome you were hoping for?

yes

Review from Verified Client

Hampshire | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Not having enough knowledge of the intricacies of financial planning, we needed an adviser we could trust to help us plan for our retirement income

How did Mark help you?

Great advice and excellent service. Not the cheapest but the service paid for itself many times over because their investment and pensions management gave far better returns than I was expecting. Highly recommended.

Have you seen the outcome you were hoping for?

Yes, our pensions fund and savings investments have grown in value far more than we expected over the time we have been looked after by Mark.

What could they have done better?

I usually find something that could be improved but in this case I honestly can't think of anything Mark could do better.

Review from Verified Client

Surrey | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Re married.

How did Mark help you?

5 stars given

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Surrey | April 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My new husband and I needed to review our pensions and investments together and were recommended to mark through a friend.

How did Mark help you?

We reviewed our pensions, upgraded our Life Assurance and he gave invaluable advice on IHT.

Have you seen the outcome you were hoping for?

Totally.
