

Financial Planning can be a minefield. With so many companies offering their services, who do you choose? Vale Life spoke with Annie Grove-White to find out why she chose to work with Magenta Financial Planning.

MAGENTA DIVINE



Julie Lord and Gretchen Betts

Who are you and what do you do?
My name is Annie Grove-White and I'm 65. I live in Cardiff and until about five years ago I was a Principal lecturer at Cardiff School of Art & Design.

How did you hear about Magenta Financial Planning?

A friend of mine told me about Julie Lord and the kind of work she did. At the time, I was on a monthly salary and it worked to have that come in regularly, and I didn't have any debts or anything. But I really wasn't very clear about many things, particularly the future.

Why did you first seek financial planning advice and what made you choose Magenta?

Both my parents had passed away and I was left some money and I remember some bits of paper coming through the post talking about twenty shares in Next and thirty shares somewhere else and I thought "What is all this about? I've got no idea!", so I contacted Julie for a first appointment.

Were you concerned about costs and did you compare with others?

Not really, I just wanted to find out what to do with these things that came through the post every now and again! I was interested in the questions she asked me - not just about sorting out my current situation but also about my life, my dreams, what I loved doing and wanted to do.

Julie went through the incomplete paperwork I had brought and saw that I'd been mis-sold a pension scheme and advised me what to do (which I did immediately) and had a refund of £10,000 which was invested back in the scheme (I couldn't take the cash).

And I left that meeting thinking 'This is someone I trust - who wants me to live a life I love', and that is why, if anyone asks me about financial things or something they are dealing with such as divorce, retirement or redundancy, I recommend Magenta, and they follow up if they want to.

Who do you work with there?

I worked with Julie for the first few years and more recently with Gretchen. Both are great, as is Mandy and the rest of the team. Before taking voluntary redundancy, I set up additional meetings to go through different scenarios and I appreciated the straightness and creativity that they brought, along with reality.

What services do they provide to you?

I usually have an annual meeting where we review what I want to accomplish and do each year, as well as in the future. We then formally agree a set of actions (based on the 'willingness to take risk assessment' which I do annually). They then implement the actions on my behalf - and I'm clear that I can call on them any time, should I need to, as I did a few years ago.

Are you happy with the service?

Absolutely! It's friendly, straight, committed, reliable and lively!

What difference has this made to your life?

It's made a massive difference! I am confident that I can live a full life now and in the future and that my money works for me and my family. So, I have peace of mind and can get on with the things I love to do and be! And the icing on the cake is that they are all amazing, fun people and I really look forward to spending time with them!

Would you be happy to recommend Magenta to others?

I do - all the time! Many friends have consulted Magenta.



Magenta Financial Planning
One Court Road, Bridgend
CF31 1BE



01656 760670

www.magentafp.com

Email: hello@magentafp.com

Twitter: @magentaFP

Facebook: Magenta FP