

MARK BASTABLE

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



Mark Bastable

Templegate Financial Planning Ltd

 Top Rated 2019

4.7 / 5  100 reviews

VouchedFor checks:

-  Recent Client Reviews
-  Transparent Fees
-  Independent Financial Adviser
-  Positive First Impressions
-  Qualifications Uploaded

Services offered

-  Insurance & Protection
-  Pensions
-  Equity Release
-  Retirement income (annuities, drawdown)
-  Auto Enrolment
-  Investments and Savings
-  Occupational Pension Transfers

+ 2 more services

Qualifications listed

Standard Qualifications: 8 Qualifications

PFS - Member by Diploma

CII - Mortgage Advice Qualification

CII - Diploma in Financial Planning

CII - Certificate in Life & Pensions

CII - Certificate in Financial Planning & Long-Term Care Insurance

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

Client Reviews

Mark Bastable

Templegate Financial Planning Ltd



4.7 out of 5

Review from Verified Client

Berkshire | February 2019

★★★★☆ 3 out of 5

Advice: ★★★☆☆

Service: ★★★☆☆

Value: ★★★☆☆

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

I had to take early retirement due to ill health and needed to review pension arrangements.

How did Mark help you?

He advised on general investments and pensions

Have you seen the outcome you were hoping for?

The pensions were combined where possible and investments moved to a platform with lower charges

What could they have done better?

Check on actions taken by administrative staff as these were sometimes done incorrectly or not at all

Review from Verified Client

Middlesex | January 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Mark has been my family's financial adviser for many years. I started using his services at

age 18 when he advised me on pensions.

How did Mark help you?

Mark has advised me in setting up a pension, S&S ISA, mortgage and life insurance.

Have you seen the outcome you were hoping for?

yes, the products recommended/chosen regularly update me on their growth and development. they are all performing as expected.

What could they have done better?

Been clearer with information when comparing multiple products. Emails aren't always laid out in an easy to read way.

Review from Verified Client

Hampshire | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Just wanted to make sure that I am making the most of my money and have adequate cover in place to ensure my children can be cared for in the future

How did Mark help you?

Honest and thorough review of my finances, explanation of the products and services available that I could consider and how these might work for me. projections and recommendations based on what i want rather than what he thinks i should have, also taking into account my views on risk rather than making assumptions.

Have you seen the outcome you were hoping for?

Yes, i have cover in place which protects both me and my family and also have seen my investments grow in the time they have been in place.

What could they have done better?

Nothing, we review my situation yearly and i am confident that he would be in touch if anything needed to change before this time.

Review from Verified Client

Worcestershire | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I had a little money to invest.

How did Mark help you?

He chose the right investments for me and explained everything carefully.

Have you seen the outcome you were hoping for?

I am pleasantly surprised by the outcome.

What could they have done better?

I don't know. He is the financial advisor and I am not. I am very happy with what he does.

Review from Verified Client

Hampshire | January 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

We needed advice on investing a lump sum for long term growth.

How did Mark help you?

We have invested through Mark Bastable for a number of years. He carries out an annual review taking into account any changes in our personal circumstances and approach to risk. Mark provides an explanation of how our investments have performed during the previous year and makes recommendations for the future.

Have you seen the outcome you were hoping for?

This year he recommended a change in our portfolio in order to minimise our ongoing costs and better reflect our investment needs. He always explains in simple language the reasons for his recommendations and the investment objectives. We have confidence in his recommendations and have recommended his services to others.

Review from Verified Client

Hampshire | January 2019

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Mark has been my financial adviser for over 20 years.I wanted to start thinking about my long term future when I had children.

How did Mark help you?

Mark listened to what we wanted to achieve, discussed and explained our options and supported us to implement our choices

Have you seen the outcome you were hoping for?

Over the long term we are in a much better place financially.

Review from Verified Client

Hampshire | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Due to poor health I decided to retire at 58 and as such asked Mark to develop my retirement plan based upon the information I provided.

How did Mark help you?

Mark provided a number of options that had been developed as possible solutions to my retirement and after discussing these with Mark we decided on and implemented the preferred course of action.

Have you seen the outcome you were hoping for?

The outcome has been realised with the lump sum being paid in January 2019 and the monthly payments commencing in February 2019.

What could they have done better?

As far as I am concerned Mark covered all of the basis specific to my situation and requirements.

Review from Verified Client

Hampshire | January 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Buying a new house, need to secure let to buy mortgage on existing property and starting pension scheme

How did Mark help you?

Mark was always very responsive and provided quality advice to help me through the difficult process of house purchase. He also supported me through the setting up of a new pension fund - helping me to understand in full my attitude to risk and to consider that against the overall pension opportunities

Have you seen the outcome you were hoping for?

Apart from excellent advice given, Mark was so approachable and responsive to my communication. This made sure that everything progressed smoothly and in a timely fashion

What could they have done better?

nothing that I can think of

Review from Verified Client

Hampshire | December 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Having very little understanding of pension jargon I decided it was time I sought professional help to make sure my finances were in the best shape.

How did Mark help you?

Mark gave me very clear information as to what was and what not was the best way to manage my pensions.

Have you seen the outcome you were hoping for?

Early days yet but I am confident I made the right choice

What could they have done better?

A little clearer about initial cost, but when explained was fair.

Review from Verified Client

Hampshire | April 2018

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★☆☆☆

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

Professional advice required.

How did Mark help you?

Unbiased advice with his long term experience.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing

Review from Verified Client

Oxfordshire | April 2018

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

On-going assistance with my investment & retirement planning.

How did Mark help you?

The use of layman's terms to explain the products and their benefits as well as doing the leg-

work with regard to options available to me.

What is your current situation? Have you seen the outcome you were hoping for?

My investments have been overseen by Mark for a number of years and overall I've been very pleased with their progress / growth.

Review from Verified Client

Hampshire | February 2018

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Value: ★★★★★

Service: ★★★★★

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

Needing advice on personal pensions when I left a company scheme.

How did Mark help you?

Mark has been our IFA for over 20 years now. He has always shown total professionalism in every aspect of his advice and approach. My recent advice needed from Mark was related to my personal pension draw down planning, this being a very important phase of my financial affairs. This has been done pretty smoothly and Mark has kept me up to date on the progress. I would, without hesitation, recommend anyone to use Mark as a reliable IFA.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Wiltshire | January 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We needed advice as first time buyers around mortgages and related insurance policies.

How did Mark help you?

Mark recently offered us advice on mortgage and related insurance products. We were extremely grateful for his quick turn around and how thoroughly he explained the products to

us which, as first time buyers, we had no previous experience or understanding of. The advice we were given was so helpful in understanding the mortgage market and the types of insurance products that we have to choose from. We wouldn't hesitate to recommend Templegate and would certainly call Mark first on any other financial issues we came up against.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Hampshire | January 2018

★★★★★ 5 out of 5

Service: ★★★★★

Value: ★★★★★

Advice: ★★★★★

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

I reached retirement date for my existing pension. I'm not ready to retire and wanted advice on what to do with the fund.

How did Mark help you?

I contacted Mark for pension advice. As part of the initial meeting Mark discussed the different types of pensions and various options available he also spoke to my current pension provider and asked for a breakdown of costs. I decided that I would like to Mark to look into reinvesting my pension. I was glad that our meeting was at home, I didn't have the answers to the financial questions so found it convenient to look up the relevant paperwork. Mark was very patient whilst I dug around in various folders. I decided to take Marks advice and transfer my two existing pensions. Mark set up the new policy and took care of the transfers. He kept me informed of each step.

What is your current situation? Have you seen the outcome you were hoping for?

My pension has been transferred to another sceme. It's too early to judge.

Review from Verified Client

Hampshire | December 2017

★★★★★ 4.7 out of 5

Value: ★★★★★

Service: ★★★★★

Advice: ★★★★★☆

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

We have recently retired and needed advice on how to deal with the monies paid out by our pension schemes and a mortgage endowment plan. Mark has been our financial adviser for some years now and it really helps to deal with someone who has made it his business to understand both our financial situation and our lifestyle aspirations.

How did Mark help you?

Mark provided advice on how to handle the monies paid out from our pension and endowment plans, helping us to allocate these between immediate, short- and long-term spending needs. We are satisfied that the ISA investments advised for the long-term funds provide the right balance between our attitude to risk and the generation of growth for future income.

What is your current situation? Have you seen the outcome you were hoping for?

Mark was professional and thorough but friendly when conducting our financial review. The documentation supporting our investment choices was clear and easy to understand.

What could they have done better?

Mark's initial advice on investing the long-term funds in a pension pot turned out not to be viable for us but we are happy with the ISA investments we have made.

Review from Verified Client

Hampshire | December 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We had pension lump sums and other savings which were primarily in cash ISAs and wanted to look for a greater return.

How did Mark help you?

My wife and I have employed Mark for over five years to manage our investments. We have always found him thorough and professional and are continually impressed with his patience in dealing with awkward questions and explaining abstruse financial terms and processes. His commitment to providing a professional service is illustrated by the speed with which he often replies to emails late in the evening. As part of his service, Mark reviews our attitude to risk on an annual basis and rebalances our portfolio to ensure maximal performance. He

recommended and subsequently arranged this year to switch our investment platform to another provider in order to reduce ongoing costs. Overall, we have always found Mark to be thoroughly honest, approachable and effective and have no hesitation in recommending him to others.

What is your current situation? Have you seen the outcome you were hoping for?

Yes. The return over the past five years has been far greater than negative returns on cash.

What could they have done better?

Nothing particular to add here.

Review from Verified Client

Hampshire | December 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Having recently retired & had a spell in hospital. I felt I needed to make sure my financial situation was in order.

How did Mark help you?

Mark met with me, my daughter & son in law to discuss my options, following my decision to reinvest the funds from an old workplace pension plan. We discussed my current financial circumstances, risk aversion & future plans for me & my family. Mark talked me through my various potential options & then subsequently came back to me with several options for further discussion. Once I had decided on the plan I wanted to proceed with, we had a couple more meetings to complete the formal paperwork, plus to sort out a short delay in the receipt of the funds, from my original provider. Mark kept both me & my daughter informed at every step of the process & I would have no hesitation in recommending him in the future to friends & family.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, completely satisfied.

What could they have done better?

I believe the only delays were caused by third parties & perhaps these could have been picked up & dealt with possibly faster.

Review from Verified Client

Hampshire | December 2017

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

Had money in a building society earning little interest.

How did Mark help you?

We met with Mark for the annual review of our investments. Prior to the meeting we filled in a questionnaire to assess any changes to our attitude to risk. Mark went through the outcome of the questionnaires with us to ensure that we were comfortable with the level of risk. As a consequence he advised us to switch our investments to a different provider that better suited our needs. The switch was carried out seamlessly. Mark gives clear explanations of the products and reasons for his advice. We would recommend his services for those who are not familiar with financial investments.

What is your current situation? Have you seen the outcome you were hoping for?

The returns on the investments have been significantly greater than keeping the money in a building society while the increase in risk is acceptable.

Review from Verified Client

Hampshire | October 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Investing savings; arranging a mortgage; transferring a pension.

How did Mark help you?

Mark Bastable has been our financial adviser for more than 10 years; during this time we have received regular advice on personal finances and most recently on company pensions. Mark offers fair and balanced financial advice which he takes care to deliver in a clear and easily understood manner; he has demonstrated on many occasions that he has

maintained a detailed and current knowledge of his portfolio - if he is not sure he does not bluff but checks his information before completing his advice on a later date. We believe Mark has integrity and honesty; he can be trusted to deliver the best possible financial advice. As a financial adviser he takes great care to explain the risks associated with each course of action. We have never had any reason to regret taking the advice provided; we hope Mark will continue to be our financial adviser for many years to come. I commend Mark Bastable to his employers and would strongly recommend his services to anyone who seeks honest and balanced financial advice.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Hampshire | May 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

the need for unbiased independent financial advice about tax efficient pensions planning.

How did Mark help you?

Mr Mark Bastable has provided my wife and I with advice regarding ISAs and an open ended investment policy. The advice was clear, concise and displayed in an easy to understand format using the Templegate System. He then setup the policies accordingly. He has always been very courteous and considerate and we would have no hesitation recommending him in the future. We also look forward to his help and advice in the future.

What is your current situation? Have you seen the outcome you were hoping for?

Indeed we have - we feel that the advice and products put in place anticipate our needs going forward.

What could they have done better?

We do not think that we could have had any better advice.

Review from Verified Client

Hampshire | May 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My wife and I have long term investments but had not had financial advice for many years- On retirement we felt that this needed addressing.

How did Mark help you?

My wife and I have used Mark's services for 2 years in regard to ISA investments. We have found him to be efficient, trustworthy and helpful. He provides a service that is clear and easy to understand.

What is your current situation? Have you seen the outcome you were hoping for?

Yes- we now have a more diversified portfolio.

What could they have done better?

Nothing

Review from Verified Client

Hampshire | April 2017

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking for a competitive re-mortgage product for our Buy to Let flat.

How did Mark help you?

I took out a remortgage product via Templegate, with completion occurring in April 2017. I was provided with sound advice on the options available at the outset, and the application process was relatively painless, and Templegate were on hand to assist where necessary. I would recommend Templegate if you are considering a re-mortgage.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Not a lot

Review from Verified Client

Surrey | February 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

After my husband died, I had some money left that was dwindling away! Mark helped me to invest my remaining funds , enabling me to manage it and make the most of it.

How did Mark help you?

I have used Templegate for a number of years, so when I wanted advice for a Lifetime Mortgage and Whole of Life Assurance, this was the place to go. Everything was explained to me in a clear and detailed way. I was very happy with the service and would not hesitate to use Templegate again.

What is your current situation? Have you seen the outcome you were hoping for?

Yes, I have now released some equity from my house.

What could they have done better?

Mark couldn't have done any more for me. I have always found him extremely patient and professional.

Review from Verified Client

Hampshire | December 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Investment planning for the future.

How did Mark help you?

I found Mark online and having read other reviews and testimonials felt confident in having his expertise help me with some investments initially and then an ISA and an overlook at the rest of my situation. Very happy with the ease with which everything was done, the transparency of fees involved and explanations along the way. Would highly recommend.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing. He even accommodated me by having early morning meetings.

Review from Verified Client

Hampshire | November 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Someone to ask advice for future planning and ensure that all areas have been considered.

How did Mark help you?

I have used Marks financial services since 2010 but following a recent bereavement earlier this year I have needed to call upon his advice and guidance to ensure that I have adequately re-planned my finances for the future of my family. Mark has remained professional and trustworthy since our first meeting but I have found his services invaluable of late and I have peace of mind going forwards that my children and I have made suitable financial arrangements for both the future and any unforeseen events that may arise. Business type: Investments and Protection.

What is your current situation? Have you seen the outcome you were hoping for?

It's too soon to see the return on my investments but the income protection and critical illness covers have given me immediate peace of mind.

Review from Verified Client

| September 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

to change our pension to a draw down.

How did Mark help you?

Dear Mark Thank you so much for the very efficient way you dealt with the transfer of our pension funds to a draw down pension. It all went very smoothly and we would have no hesitation in recommending you. Thank you Phil and Chris.

What is your current situation? Have you seen the outcome you were hoping for?

we received our draw down money and now the rest is invested in what we hope is a good long term plan.

Review from Verified Client

Wiltshire | April 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking for a mortgage on a new property purchase.

How did Mark help you?

Arranged mortgage and appropriate insurance policies.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Hampshire | February 2016

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

We were looking to save for the future.

How did Mark help you?

Mr Mark Bastable gave information and advice on transferring and offshore bond into a UK ISA and Unit Trust for my Wife and I. The initial consultation looked at our financial situation and tried to anticipate future needs. Mark was extremely thorough and meticulous to ensure

that he could recommend the correct package. He was very courteous and helpful. At the second consultation he produced a balanced and complete package which we were very happy with. All the information generated from both Templegate or personally from Mark was first class and easy to understand. We would both highly recommend Mark as an Independent Financial Advisor and look forward to a long and fruitful relationship.

What is your current situation? Have you seen the outcome you were hoping for?

The investment is ongoing.

What could they have done better?

Excellent and friendly advice

Review from Verified Client

Hampshire | January 2016

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Moving home.

How did Mark help you?

Mark was very pro-active making the process easy and seamless for us. He was extremely responsive and achieved a product for us very quickly. We would highly recommend!.

What is your current situation? Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Hampshire | October 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I have just bought a flat and used Templegate for financial advice on the type of mortgage to get.

How did Mark help you?

I only have positive things to say about the experience. Firstly, Mark Bastable listened to my requirements and took time to understand what was the most important aspects of any potential mortgage, given my financial situation and personal goals. We discussed many different types and agreed that a tracker mortgage was the best option for me. He then was able to give me a number of different options from different providers based over different lengths of time. We discussed the pros and cons of each and I was able to make a decision which best suited me.

What is your current situation? Have you seen the outcome you were hoping for?

I have my offer from the Mortgage company and I am just waiting to complete. The whole process was simple, quick and devoid of any fluff or hyperbole. He explained each mortgage in laymens terms so I felt fully engaged in the process and felt able to make a decision. If you want balanced straightforward advice, in words you can understand, then Templegate is the firm to approach.

Review from Verified Client

Hampshire | September 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Mortgage, pension, & investment advice.

How did Mark help you?

Discussed, advised & arranged everything i needed.

What is your current situation? Have you seen the outcome you were hoping for?

Yes everything is sorted.

What could they have done better?

I'm happy with everything arranged

Review from Verified Client

Hampshire | June 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Inheritance.

How did Mark help you?

Advised on investment.

What is your current situation? Have you seen the outcome you were hoping for?

I am happy to recommend Mark. He is honest, conscientious and with his excellent resources he has recommended sound investment funds for me that have performed well in difficult times recently.

Review from Verified Client

Hampshire | June 2015

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★☆

Value: ★★★★★

I have received a first class re-mortgage advice from Templegate Financial Services. Their independent financial service was swift and professional; I would definitely use them again and recommend them to anyone wanting a hassle free re-mortgage service.

What could they have done better?

Nothing, I cannot fault the service that I received.

Review from Verified Client

Hampshire | May 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark recently provided me with advice in relation to a remortgage. He secured an excellent rate and has enabled me to reduce my payment terms by five years for very limited increase

in monthly payment. I am delighted - this switch will save me about 8,000 against a 40k borrowing. Impressive. Mark was reliable, available, knowledgeable and easy to work with. I thoroughly recommend him.

What could they have done better?

Nothing

Review from Verified Client

Hampshire | April 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark advised me through an evaluation and subsequent switch of my mortgage product. He took the time to make sure I was happy with all the details of the new product he was recommending, but most of all he was very responsive, often chasing me to ensure things got turned around in a quick and timely manner, which is exactly what I had asked for. In short it was quick, painless and saved me a lot of money, I will be coming to Mark whenever I need similar services in the future

Review from Verified Client

Hampshire | April 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Templegate Financial was recommended to us, for advice on remortgaging, by close friends who had previously used Mark. The service was simple, easy to understand and honest. The product we chose is exactly what we wanted. We lead a busy life and would have struggled to find a product, and find the time to actually remortgage, if we hadn't used his service.

Review from Verified Client

Hampshire | March 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I contacted Mark to give me some advice on pensions as I had used him previously for Mortgage advice. The advice he gave was professional and reasoned with a through explanation of the whole process. I've never known anyone reply so quickly to my enquiries and would highly recommended his advice.

Review from Verified Client

Hampshire | March 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Our family have been investing via Templegate and Mark Bastable for a number of years. Mark has always listened very carefully to our situation and we have never felt rushed or pressurised. Once the investments start Mark keeps in regular contact and is keen to ensure the original requirements are still correct as time moves on. Mark is completely independent and provides products from across the full spectrum. At all times the full costs and charges have always been made clear and I believe them to be very competitive. In addition Mark is an engaging individual which makes all meetings enjoyable. I would have no problem with recommending Mark to anyone.

What could they have done better?

Nothing I can think of

Review from Verified Client

Hampshire | March 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We contacted Mark for mortgage advice. We were unsure how much we could borrow or what position we were in in the current mortgage climate. Through all email correspondence

and the two meetings we had, Mark was extremely clear, concise and helpful. We ended up with a mortgage deal we are very happy with and which we would not have found on our own. Mark always responded to our queries throughout the mortgage application process quickly and kept us completely up to date. Mark offered helpful advice on our other finances, including life insurance, something we found useful and appreciated. We will certainly be using Mark in the future and have no hesitation in recommending him to others.

Review from Verified Client

Hampshire | February 2015

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark provides a really helpful review of all my financial affairs. He knows his stuff and chases to obtain the best deal always. His is diligence and helpful and at all times professional.

Review from Verified Client

Hampshire | September 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Hi Mark. Just a quick note to advise that we completed the purchase of our house today. I wanted to thank you for the advice and assistance you have offered us during the whole process. Your service has been excellent.

Review from Verified Client

Hampshire | July 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark, has for many years provided us with sound financial advice with regard to investments

into ISAs and personal pensions. I have no hesitation in recommending him to others.

Review from Verified Client

London | July 2014

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We received an excellent service from Templegate. Our advisor discussed our specific needs, found us an excellent product, and managed to drive through the deal to meet ambitious timescales. Given that the transaction took place soon after the new MMR rules were in place and still bedding down, this was some achievement. Perhaps as importantly, he was always on hand to respond quickly to our questions, and kept us informed of developments at each stage of the process. I would highly recommend their services.

Review from Verified Client

Hampshire | July 2014

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I have had a shares ISA for several years now and have been frustrated with the lack of visibility and general interaction I had with the fund. Mark gave my wife and I some really good advice on our Mortgage so I asked him to take a look at my portfolio. He has access to whole of market and could therefore match my requirements to a specific fund. Mark was flexible enough to meet me near where I work and took me through an exercise to define what level of risk I was willing to accept and what I specifically require from a fund. I will use Mark again as I have found his advice to be impartial, pragmatic and of great use.

Review from Verified Client

Hampshire | July 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I contacted Mark at Templegate for mortgage advice. The information he provided was both clear and helpful. Mark understood the urgency of my situation and completed the application quickly and efficiently, resulting in the successful purchase of our new home. Mark was always available to answer questions and I found his service excellent throughout. I would highly recommend using Templegate.

Review from Verified Client

Hampshire | April 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We knew with a complex income that obtaining a mortgage could be a challenge, we were almost scared to approach the high street so through recommendation got in touch with Mark from Templegate. Mark met with us and after getting all the information went away to search his markets. Within hours he had matched our details to a specialist lender who were able to offer us a mortgage. Because of the complexities of our application it took quite a while but Mark held our hand through the entire process and he was always at the end of the phone to answer any queries. We would certainly recommend Mark and Templegate, his expertise and knowledge are top drawer, we will be coming back!

What could they have done better?

Nothing really, Mark exceeded our expectations for service and did exactly what we needed.

Review from Verified Client

Hampshire | March 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

We had had poor experiences previously of independent financial advice. We struggled to find a local independent financial advisor and in fact had to cancel an appointment as a firm advertising as local turned out to be based 35 miles away. We found Mark through the vouchedfor website and enquired about an appointment. He responded within 48 hours and the appointment was arranged that week. We needed a new mortgage and he quickly

identified a mortgage with a really competitive rate which had not showed up in our searches on comparison websites. As a result of his excellent service we have gone on to use Mark for investment advice and products and we both feel that the thorough consultations mean that we have investments that are perfectly tailored to our needs. We would highly recommend him and have been very satisfied.

Review from Verified Client

Hampshire | March 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I used Templegate to arrange a Buy to let mortgage for a rental property. Mark was very professional, timely and knowledgeable. I got the best rate that I could hope for and also he kept me informed at every stage. I would have no hesitation in using Mark again for any financial matters.

Review from Verified Client

Hampshire | March 2014

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark is great at researching and providing the best mortgage available

Review from Verified Client

Hampshire | February 2014

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

He's never 'off-line' in that he responds to emails outside of 'office hours'.

Review from Verified Client

Hampshire | January 2014

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark is a patient listener and takes the time and trouble to explain things clearly and, if necessary, more than once. He takes time to discuss things thoroughly and to explore issues.

Review from Verified Client

Hampshire | December 2013

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

He is very reliable in staying in touch and also realistic about financial risks associated with his advice.

Review from Verified Client

Hampshire | December 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Over the many years that I have been a client of Mr Bastable's I have always found him to be an financial adviser with integrity. Honest, reliable and knowledgeable. I have no reservations in recommending Mark.

What could they have done better?

I have no suggestions as I believe he does a very good job looking after his customers.

Review from Verified Client

Hampshire | December 2013

★★★★☆ 4.3 out of 5

Advice: ★★★★★☆

Service: ★★★★★

Value: ★★★★★☆

Mark has provided investment advice for me and my wife since 2011. Weve been very happy with the service he has provided. Although ours will be among the smaller of the investment portfolios that he manages, Mark is always available to give us advice about how best to balance and manage our investments.

Review from Verified Client

Hampshire | December 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark explains everything well he translates everything in to laymens terms,he will go that extra mile to make sure you get the right product at the right price.

Review from Verified Client

Hampshire | December 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark is great at listening to want you want to achieve and then helping you achieve your financial goals

Review from Verified Client

Hampshire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

The advice that we have received from Mark over the years has always been to the highest standard that we could of wished for. He shows constant consideration in all aspects of our needs and is always willing to offer the best advice that he is able to give. I would not hesitate to recommend Mark to any person who was in need of advice because of the excellent advice and manor that he has shown to us.

Review from Verified Client

Hampshire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Excellent communication and explanation with regard to which investment funds to invest my pension funds in. I shall be using Mark again next year when I need expert advice on choosing the best annuity.

Review from Verified Client

Berkshire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Relationship Building Talking in plain uncomplicated finance language Providing a range of illustrations

What could they have done better?

Make suggestions when things change - ie the mortgage rate is falling/rising these are some suggestion of what you can do or you should be thinking about

Review from Verified Client

Surrey | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark was extremely patient with us whilst we decided what we wanted to look into. His advice was always objective, and whilst he showed us all the various options and directions open to us, we never felt that we were under any pressure, and that he always had our best interests at heart. I can't recommend Mark highly enough.

Review from Verified Client

Hampshire | November 2013

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Clear and available to answer our questions and concerns

Review from Verified Client

Hampshire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Great to have someone who you can trust and takes the weight of your shoulders.

What could they have done better?

All good

Review from Verified Client

Hampshire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark is an extremely conscientious and honest advisor. He is always available and happy to discuss any matters of concern. He understands his subject well and I am confident in his abilities to provide me with the best possible financial advice.

Review from Verified Client

Oxfordshire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

After a full review of our current financial situation, he gives us honest advice to suit our needs.

Review from Verified Client

Hampshire | November 2013

★★★★☆ 4 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I am happy to recommend Mark. He is honest, conscientious and with his excellent resources he has recommended sound investment funds for me that have performed well in difficult times recently.

Review from Verified Client

Hampshire | November 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

He carefully considers our situation (that is relevant to us) and puts together a plan to achieve our objectives.

What could they have done better?

He could, perhaps, be just a little more timely in writing/emailing.

Review from Verified Client

Hampshire | October 2013

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark has always listened to our requirements and where appropriate has provided advice and products to fulfill those needs. Mark continues to keep in contact and makes himself available should we need to re-visit our finances.

Review from Verified Client

Hampshire | October 2013

★★★★☆ 3.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Prior to my retirement in 2008 I needed help with a previous companies pension scheme of which I was a member. They had invested my pension in Equitable Life and I had to make some decisions about things I did not understand. Mark not only helped me with this but when I retired also helped me to get the best pension from my various funds. Since then he has been very helpful in advising me about my savings.

What could they have done better?

I sometimes find understanding the financial jargon quite difficult and I have had to ask Mark to slow down a bit.

Review from Verified Client

Oxfordshire | October 2013

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Gives very good advice on all aspects of my investments especially with respect to retirement planning, understands the level of risk I'm prepared to take & is very professional in his approach - I've been dealing with Mark for over 20 years!

Review from Verified Client

Hampshire | October 2013

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Delivers advice in an easily understood manner without being patronising.

Review from Verified Client

Hampshire | September 2013

★★★★☆ 4.3 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Great on communication and finance technicalities. Mark always advises and not any hard sell.

Review from Verified Client

Hampshire | September 2013

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Mark came highly recommended to assist me with pension planning advice. He independently researched, assessed and recommended the best option to consolidate some of my pension funds. He was methodical and diligent in his work, providing a detailed report and clear reasons for the recommended course of action. He avoids financial jargon in delivering his advice; has a good sense of humour and was a pleasure to work with. I'll certainly retain Mark to assist with my future financial planning needs. Bryn Hughes, Basingstoke. Business type: Pension, completed 01/03/2013

Review from Verified Client

Hampshire | September 2013

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

I have been a client of Mark's since 2010. Mark arranged our mortgage in 2010 then our subsequent re-mortgage recently. The service we received was to a high standard, the whole process was clearly explained and well documented. Communication was excellent, all emails were answered promptly. I would highly recommend Templegate Financial Services.

Review from Verified Client

London | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Communication was clear throughout and in a language that I understand

What could they have done better?

Nothing stands out, Did what is says on the tiun.

Review from Verified Client

Hampshire | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark Bastable offers full and detailed information; he has never rushed to offer a quick fix; he takes time to explain the detail; I would recommend Mark to any person requiring information on appropriate financial options. All customers want to be told the answer to the question; what should I do now? Mark Bastable is careful not to decide for his client; he avoids steering and ensures all options are understood. Mark is a professional who keeps his knowledge current; I have total confidence that he is on my side and will ensure I fully understand the cost / benefit analysis for each financial option.

What could they have done better?

Mark is excellent in defining and explaining options; I would sometimes like more of his opinion and more focussed advice. Sometimes when the decision is 50/50 the adviser can only say the matter is too close to call, however there are more clear cut decisions where a trusted opinion is hoped for.

Review from Verified Client

Surrey | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

Mark has been my financial adviser around 20 years. In that time he has advised on many aspects of my financial life. He has never been pushy, he has always very patiently explained complicated policies sometimes several times including diagrams. I've always felt Mark has had my best interests in mind and never that he would try to get to do sign up for anything that was not appropriate. He keeps in touch regularly without badgering and is also a very nice man. I thoroughly recommend him

What could they have done better?

No!

Review from Verified Client

Hampshire | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

I have received excellent advice on the investment of money and for buy to let mortgaging. I would certainly use Templegate again as the information that I received was in a way that I could understand not financial jargon. I certainly would recommend them. Robert Rutherford from Basingstoke. Business type: Buy to Let Mortgage, completed 27/06/2013.

Review from Verified Client

Worcestershire | September 2013

★★★★★ ng-star-full.jpg" /> 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

Mark Bastable has been working with me since 2008. I have been very happy with the service he has provided for me. He is clear and patient in his explanation and never patronising. Whether it is a small amount of money or a large one the same clear, easy to understand advice is given. The reports and summaries of the job undertaken are always detailed yet comprehensible. Friends and family have tried to get me to move my finances to another advisor but I am happy to work with Mark and I trust him. Mark has helped me with ISAs, pensions and other investments and as long as he continues to give the service he gives I will continue to ask him to look after my financial matters. I am a single female 61 years of age. Veronica Tyrrell from Worcester. Business type: Investments, completed 15/07/2013.

What could they have done better?

He knows far more about financial matters than I do so I leave it to him to advise me.

Review from Verified Client

Hampshire | September 2013

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

The advise given was very informative and straight forward to suit my needs. The whole process went very smoothly indeed and Id certainly use Templegate Financial Services again and would recommend them to anyone seeking financial advise. Pauline Baker from Basingstoke. Business type: Buy to Let mortgage, completed 24/07/2013.
