

At McCreas we pride ourselves on being independent, professional, approachable and committed to providing a first class service to our clients. We are delighted to share some of the comments we have received from both long-standing and new clients of the business.



"For many years Douglas, Claire and the team at McCrea Financial Services have given me sound financial advice tailored to suit my needs. I have every confidence in all that they do for me. It is great to have a named contact and Claire Dolan has proved to be extremely reliable, efficient, helpful, approachable and responsive to any questions I have. Nothing is too much trouble and queries are answered promptly.

I highly recommend McCrea Financial Services in whom I have complete trust."

SM – Glasgow

"I have been a client of McCreas for almost twenty years. In that time Douglas and his staff have been more than helpful offering financial advice in a friendly and professional manner."

AS – Lenzie

"I would like to take the opportunity to thank all staff at McCrea Financial Services for their excellent work and I would have no hesitation to recommend your expertise to others."

PK – Irvine

"I am just delighted to have found a financial advisor who speaks plain English, does not over sell and has a great sense of humour!"

VA - Glasgow

"As retirement drew nearer for both of us we looked for independent financial advice. McCreas were recommended to us and we have been delighted with the personal advice Douglas has given us, building up a level of trust that McCreas look after our best interest in financial matters."

IL – Glasgow

"As a new client of McCrea Financial Services, in my direct dealings with Jenny Pritchard and Jonathan Campbell, I have found them both extremely understanding, helpful, professional, courteous and knowledgeable.

As newcomers to the pension business, both my wife and I were made to feel very welcome at the meetings we had in the comfortable surroundings of the Glasgow office and we have been impressed with their attention to detail and their prompt communication.

We would be very happy to recommend McCrea Financial Services to our family and friends for any financial advice or help they may need in the future."

CM - Balmedie

"McCrea Financial Services are about to look after the finances of the third generation of my family. The service and wisdom they offer are second to none bringing reassurance and clarity to the often daunting, processes of investing, remortgaging and well... just staying afloat in the current challenging financial world."

CD – Glasgow

"I have been a client of McCreas for many years and have always been looked after with the highest professionalism, the most affable courtesy, and importantly, highly profitable advice and guidance."

JM – Surrey

"When dealing with a financial adviser, the most important factor for me is confidence. In all my dealings with McCrea Financial Services I feel confident that my affairs are being dealt with in a very professional yet friendly manner. Calls and emails are responded to immediately and I am always kept up to date with progress. Without hesitation, I highly recommend the company and thank the staff for continuing excellent service."

BW – Giffnock

"From our first meeting with John the service given was 100% professional. While the mortgage process was ongoing Yvonne always kept us fully updated. In total, the service was fantastic and as individuals both John and Yvonne were lovely to deal with. We would recommend to everyone that McCrea Financial Services are at the top of their game."

JF and JC – Glasgow

"I have had a long relationship with McCrea Financial Services and the basis of this type of service is the trust between both parties.

My brother introduced me to Douglas about fifteen years ago and since then both Douglas and Claire Dolan have dealt with my investment portfolio. The next issue McCreas are dealing with, on my behalf, is my pension. I have recommended McCreas to

several friends over the years and I hope to continue my relationship with them in the future."

PT – Castle Douglas

"I have had to contact Jonathan Campbell and Jenny Pritchard on several occasions in my role as a Trustee for a Discretionary Trust. I have always found them knowledgeable, friendly and professional.

They have provided useful information and broken down - what seemed to me - complex financial and legal jargon into plain English and explained processes clearly but without patronising, which has been very reassuring as I am new to this role and have at times felt out of my depth."

LF – Dumfries



Why McCreas?

At McCreas we pride ourselves on being independent, professional, approachable and committed to providing a first class service to our clients. We pride ourselves on NOT being just another firm of Independent Financial Advisers.

We are :

INDEPENDENT - not tied to any particular company, bank or insurance company. We are authorised, regulated and approved by the FCA.

PROFESSIONAL - the staff at McCreas have many years of experience and all McCreas employees have Personal Development Plans which include improving their technical knowledge through CII Examinations .

COMMITTED - Our business is all about looking after you, the client - each client has a designated Independent Financial Adviser and support allowing you to build a professional and personal relationship over the years.

A **GREAT TEAM** - dedicated professional advisers backed up by superb administrators with sophisticated systems allowing us to provide a quality personalised service to you the client!

How are we different?

How many IFAs work and encourage their staff to develop their skills that they gain unique awards ? - We were the first IFA in the UK to achieve GOLD standard in Investors in People.

How many IFAs appreciate that when looking after peoples financial affairs it is about building trust and working together for decades not weeks.

How many IFAs obtain the majority of their new clients from referrals from happy existing customers who are comfortable passing their friends and families on to a firm they can trust.

How many other IFAs spend time and effort working for, running events and raising funds for charity?

How many IFAs do you know support and sponsor local sportsmen and women and help promising children in sport to achieve their goals?

Most of all, we care - about the important things in life, and about you - our clients.