

# HILLROSS

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## **Client feedback and testimonials**

In January 2015 David was announced as the winner of the Hillross Adviser of the Year Award which recognises a CFP® adviser who has demonstrated the highest level of professionalism and excellence through client service, advice delivery and implementation.

A panel from across the industry (including Mark Rantall – Chief Executive Officer of the Financial Planning Association) assessed and judged the award and clients were surveyed by an independent research specialist to assess client advocacy as part of the process.

The below is a summary of direct feedback provided from a survey of more than 100 of our clients:

*“David Kennedy provides a feeling that you are the only client such is his attention to detail and personal service. He is completely attentive to my needs and submits plans and attends to all Government regulations sometimes without my need to do so. Mr Kennedy has my support and that of my family.”*

*“David is a proactive and caring adviser who established in a very short space of time his integrity, knowledge and understanding of our goals and objectives for retirement. Unlike previous advisers I have used, I have complete faith in David's judgement and recommendations for my financial investments.”*

*“David is always utterly professional as well as being attentive and considerate of my personal situation and circumstances. He is highly intelligent and hardworking and also has high emotional intelligence, this combination of skills, a caring disposition and a justice mindset (wanting the best outcomes for his clients) is wonderful.”*

*“My wife and I have found it very easy to communicate and relate to David. We feel very at ease when going through complex financial issues. For us, his greatest asset is his youth as he will see us through to our end date. Having been serviced by David Martin for approx. 20 years it was a relief that David Martin was able to identify and transfer his clients (us) to David Kennedy seamlessly.”*

*“David always answers my questions no matter how trivial with respect, patience and in a way I can understand. This and his competent handling of our financial affairs has enabled us to feel confident and secure in looking towards our retirement.”*

*“Last Year, my wife and I undertook major changes in preparation for retirement - the transition phase....David Kennedy was in the plan all the way and assisted with impacts of various options and costings. David was fantastic - he treats my wife and I as if we were his parents!”*

*“David is great, always there when you need him, always responsive and will go out of his way to provide you with a solution in a simplistic way.”*

*“David is absolutely brilliant. We feel that we are on strong financial ground and totally set up for the future. For us ... his advice is a great mix of risk management (our insurances are all in place now) and wealth building (we are invested in a number of managed funds both in Australia and internationally, which have performed very well). I*

*recommend David to all my friends and family - and lots have been to see him, and all feel the same way!"*

*"He is ethical. There were circumstances where he advised me to take a certain path that resulted in him not being paid for me taking that route (e.g. asking my current bank to match the rate they had quoted; also a time he recommended me going through my existing mortgage to borrow for shares instead of using a margin loan)."*

*"David takes the time to map out my financial circumstances and options ready for update / review meetings. Takes the time to explain options without pushing any particular agenda. I'm satisfied with the advice I receive."*

*"David and team not only provided me excellent financial advice and took considerable time to ensure I understood their recommended actions, but their customer service and business-like approach is exceptionally good."*

*"What I like most about David Kennedy is how he gently reminds me of all the things I have to do and makes me feel he is therefore watching out for my best interest. I definitely am of the opinion that David is one of those advisors who goes the extra mile to make my experience a positive and beneficial one."*

*"I have a high regard for David. Apart from his effectiveness and knowledge as an advisor he is also an excellent listener. This quality is much rarer than would be commonly assumed."*

*"David has the empathy to understand the underlying as well as the obvious concerns I have raised with him. I also appreciate his ability to explain broad, global issues and how they affect our local market."*

*"David is an excellent financial adviser. He is technically very competent is trustworthy and understands his client's needs and his advice is tailored around the client needs. He is easy to get along with and well liked. I have recommended my family and a number of friends to David. I would strongly support David Kennedy for the Hillross Adviser of the Year Award."*

*"I feel very confident that I am being very well advised."*

*"I am really happy with David. So far I have recommended a number of family and friends to David. I think that speaks volumes."*

*"David always responds to any queries extremely quickly, is accommodating and has arrangements in place to meet him at another office, should that be more convenient for the client. All in all, he is an exemplary financial adviser."*