



Dave Penny
Invest Southwest

Overall ★★★★★ 4.7
 Advice ★★★★★ 4.8
 Service ★★★★★ 4.8
 Value ★★★★★ 4.6
 From 29 reviews

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 4.3

Dave is open and approachable. He is also clear in his advice and takes special care to explain the risks involved in investment as well as the rewards. He does not try to "sell" solutions which you do not need and is keen to understand your financial priorities. I originally chose to manage my own investment portfolio but subsequently realised that I was not as committed to this as I had thought. Dave reorganised my investment to provide for an investment spread based on my situation. This has been working well.

What could your adviser do better?

Dave is the only advisor I have ever had so I have nothing to compare him with. However he has met my expectations and I have been happy to recommend him.

Nick, Devon Posted: 01-10-2014 Verified: 01-10-2014 Client for 4 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Q: "Please write a full summary of what your adviser does well"

A: Listens.

Dave is an easy person to get on with and provides a straightforward decent service. He explains what you need (or must) know in a way that is easy to understand whilst maintaining an appropriate level of professionalism.

What could your adviser do better?

Do everything for free :-)

Whilst that may be appealing it would not be good as you cannot receive sound advice without a reasonable price attached, and low cost or free services are typically lower standard so reality is you get what you pay for. So perhaps not really for free!

Neil, Surrey Posted: 30-09-2014 Verified: 30-09-2014 Client for 2 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Dave provided help and advice on planning our financial future after taking time to understand our circumstances and goals. Specifically this covered investment and mortgage advice. Dave has always been quick to reply to our questions and explains our options clearly and comprehensively, to find a solution specific to our circumstances and needs.

Really impressed with his help, advice and patience.....

Adam & Kate, Devon Posted: 30-09-2014 Verified: 30-09-2014 Client for 0 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

My Advisor ran through all aspects of the products I wanted information on and was able to answer confidently the "pro's" and "cons" of the subjects discussed.

Nick blackwell, Somerset Posted: 30-09-2014 Verified: 30-09-2014 Client for 6 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 4.3

Dave generally points out the "error of my ways" before moving forward to analyse the previous years performance of my pension fund.
This year has been particularly difficult for me and advice passed to me from Dave has made me pause to re examine certain long term goals.
I get the impression that second best won't do, Dave and the team strive to do everything well!

What could your adviser do better?

Keep going forward with the same "can do" attitude.

Dave, Somerset Posted: 30-09-2014 Verified: 30-09-2014 Client for 2 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 3.7

Communicates quickly and well
Is patient reliable (with appointments ad information)

What could your adviser do better?

Perhaps a more thorough indication of the possible decrease / increase in the near future of funds compared with the then existing range of investments

Kenneth, Somerset Posted: 30-09-2014 Verified: 30-09-2014 Client for 1 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

The amount of time, care and attention that Dave Penny has put in to my financial affairs is extraordinary. Nothing seems to be too much trouble. He, and everyone in his office is unfailingly cheerful. They are a true pleasure to do business with and I trust them implicitly to produce the best results for my money.

What could your adviser do better?

Genuinely, I cannot think how they could improve.

David, Somerset Posted: 30-09-2014 Verified: 30-09-2014 Client for 0 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

mr penny and his entire staff have at all times been accessable,polite,nothing is to much trouble.my investments exceed my expectations and i would not hesitate to recommend his services.

Martin, Somerset Posted: 30-09-2014 Verified: 30-09-2014 Client for 4 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Even though my investment was relatively small, the quality of care, service and advice were excellent.

What could your adviser do better?

I cannot think of a single area which could have been improved upon.

Lindsay, Somerset Posted: 30-09-2014 Verified: 30-09-2014 Client for 0 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Absolutely delighted with the service received from Dave and his team. From beginning to end was an absolute pleasure to deal with, always on the end of the phone and matters were carried out promptly and efficiently. Always kept fully informed as to progress and would have no hesitation in using his services again.

What could your adviser do better?

For the product required I can honestly say that I feel nothing could have been done better.

Nick, Somerset Posted: 30-09-2014 Verified: 30-09-2014 Client for 0 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Initially he made me really think about what I wanted in realistic terms. Then he set out how to achieve it. That was about 7 years ago when the firm was just starting out. Until then my investments and pension plans had been totally ad hoc. When a major illness changed things for me he helped me to re-plan methodically and without fuss. We continued to evaluate my needs at each review and make adjustments as my needs, changes in the markets, and changes in products dictated. I am now retired (early) on an income of slightly more than I had expected, with good savings behind me for my expected future needs, and for holiday fun! I thank the day that I was told about Dave and invest southwest.

What could your adviser do better?

I honestly can't think of anything.

Anne, Somerset Posted: 27-01-2014 Verified: 27-01-2014 Client for 7 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 4.0

As well as always providing good advice, Dave has always been friendly, up front and honest regarding financial advice something that I appreciate

What could your adviser do better?

More regular contact and review of finances

James, Somerset Posted: 05-07-2013 Verified: 05-07-2013 Client for 6 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 4.0

listened, analysed and recommended a clear course of action taking into account my needs and risk profile

N g, Kent Posted: 05-06-2013 Verified: 06-06-2013 Client for 5 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 4.3

Dave Penny handles all my saving, investment and pension plans and has adapted the advice as my needs and circumstances have changed. I have never compared his fees with others as I am sure they will be competitive. The charges are far outweighed by the benefits. I know exactly what the charges are. The advice as changes to meet the needs of my changing circumstances

Hester, Somerset Posted: 05-06-2013 Verified: 06-06-2013 Client for 9 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Dave is very knowledgeable in his field and genuinely cares that as a client I get the best advice or products for me. He is able to explain all of the legal jargon in simple English so we know the advice we're getting is right for us. He is also supported by a great team, so that in his absence I don't go without support and there's always someone who can help.

I have now been a client for over 6 years and during this time Dave knows and understands my needs and those of my family. As circumstances have changed, Dave has been there to give the right advice.

I have recommended Dave to my colleagues and friends and would have no hesitation in doing so again in the future.

What could your adviser do better?

Nothing.

Jon, Somerset Posted: 04-06-2013 Verified: 04-06-2013 Client for 7 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 4.7

Dave was very helpful in explaining things in a way that I could understand. He is very approachable and did not make me feel stupid as some other advisers have done in the past. He keeps me informed of my finances on a regular basis.

What could your adviser do better?

There is nothing that I could wish my adviser to do better as I am completely happy with the service I have received.

Alison, Somerset Posted: 01-06-2013 Verified: 03-06-2013 Client for 7 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

As full time business people my wife and I, like many parents of teenage children, have little opportunity to take time out to fully understand products and services in the financial market place; one of the main reasons we were happy to work with a trustworthy and extremely attentive advisor such as Dave Penny. Dave Penny and his team provided my wife and I with direction and support as they led us through the minefield of financial services, with clarity and transparency.

What could your adviser do better?

Biscuits with the tea?

Robert, Somerset Posted: 31-05-2013 Verified: 03-06-2013 Client for 2 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Listens to your needs and resources and maximises your returns

Jamie, Devon Posted: 31-05-2013 Verified: 31-05-2013 Client for 4 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 4.3

I was very pleased with the advice I received from Dave Penny regarding my various work-based pensions. I did not know how to deal with my pensions, some of which had been dormant for a number of years. Dave Penny fully explained my options and took time to deal with my questions to ensure that I fully understood my options so that I was able to make an informed decision.

I was not under any pressure to make a decision, but once I had, Dave Penny carried out my wishes extremely efficiently. His Assistant even called me after Dave Penny's work was completed to :-

1. advise me of the amount and date of each payment I would receive;
2. check that the payments had safely reached my current account; and
3. ask if I was happy with the service and whether there was anything further they could assist me with.

What could your adviser do better?

I cannot think of anything which my advisor could have done better. I was very pleased with the whole service offered by Dave Penny and his colleagues.

Lynda, Somerset Posted: 30-05-2013 Verified: 30-05-2013 Client for 3 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Gives one a feeling of confidence that he really does know what he is talking about!! Extremely helpful and flexible.

Michael, Somerset Posted: 30-05-2013 Verified: 30-05-2013 Client for 1 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

In the drop down box 'Dave's best quality' there should be a choice saying 'All of the above'. Dave immediately puts you at ease. His sincerity comes through very quickly, as does his patience. I have total confidence in the man & would happily recommend him to any of my friends & associates. To trust somebody with your investment/finances is a very big thing to give to somebody but i have no qualms about giving over to Dave. Genuinely an all round good egg!

Miles, Somerset Posted: 30-05-2013 Verified: 30-05-2013 Client for 2 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Dave fully understands what advice we are looking for prior to our visits. He is well researched and prepared and is extremely knowledgeable about the different products available in the area we are discussing. I trust his opinion and he is very honest about pros, cons and risks involved in investments etc. I never feel pressured into taking decisions I am not fully committed to and that is of great reassurance. Dave is very friendly yet maintains a professional manner and is also really helpful in fitting me in to see him at short notice which is appreciated. Dave is well supported by efficient, knowledgeable and friendly support staff. I would have no hesitation in recommending to others. I also really value the yearly catch ups to review my position .

What could your adviser do better?

Nothing of any significance

Paul Hardy, Somerset Posted: 30-05-2013 Verified: 30-05-2013 Client for 7 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Communicates the risks involved setting out the advice in a clear and comprehensible way. Assesses our current financial position, appetite for risk and future long term financial goals. We have been using Invest Southwest for a number of years on a personal as well as a corporate level and they have been nothing but extremely professional, courteous and a pleasure to deal with. I can't recommend their services enough.

Jon, Devon Posted: 30-05-2013 Verified: 30-05-2013 Client for 3 Years

Advice: ★★★★★ Service: ★★★★★☆ Value: ★★★★★ 4.7

Mr Penny primarily identified a mortgage for me, which was excellent value and continues to save me a great deal of money (compared with similar products). In addition he is very friendly and approachable, nothing is to much trouble, and he goes to a lot of trouble to fully explain products to people who are not very financially savvy.

Mark, Somerset Posted: 29-05-2013 Verified: 29-05-2013 Client for 6 Years

Advice: ★★★★★☆ Service: ★★★★★☆ Value: ★★★★★☆ 4.0

Our advisor prepares well for our meetings with him, is fully aware of and remembers our financial status and risk strategy

John, Somerset Posted: 29-05-2013 Verified: 29-05-2013 Client for 3 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

I have received advice from Dave for over 4 years now and he has advised me on numerous financial decisions. I find him extremely knowledgeable, accurate and most importantly he acts with integrity when it comes to his advice and costs.

I would recommend Dave to any other potential clients looking for a quality financial Adviser.

Mark, Avon Posted: 22-05-2013 Verified: 22-05-2013 Client for 5 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

I have used Matthew Duncan for financial advice over the last 8 years the service he provides is nothing short of exceptional. One of the most honest trust worthy people I have ever met. I will not hesitate to contact Matthew for advice when I need it next.

Nick, Avon Posted: 22-05-2013 Verified: 22-05-2013 Client for 9 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

Dave was very thorough in ascertaining what the right deal was for us when our Mortgage was due for renewal and found the best available, he was clear and concise with the explanation of his findings and ensured that we had fully understood our options.

I would not hesitate to recommend him for any area of financial advice.

Linda, Somerset Posted: 21-05-2013 Verified: 22-05-2013 Client for 9 Years

Advice: ★★★★★ Service: ★★★★★ Value: ★★★★★ 5.0

number of things

What could your adviser do better?
not sure

Anon, Somerset Posted: 21-05-2013 Verified: 21-05-2013 Client for 1 Years

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