

# DAISY WHATELEY

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Background report to support  
inclusion in the **2020 Guide To The  
UK's Top Rated Financial Advisers**



## Daisy Whateley

Whateley Wealth Management Ltd

 Top Rated 2020

5.0 / 5  36 reviews

### VouchedFor checks:

 FCA Regulated

 Recent Client Reviews

 Whole of Market Mortgage Adviser

 Qualifications Uploaded

 Transparent Fees

 Positive First Impressions

### Services offered

 Mortgages

 Insurance & Protection

### Qualifications listed

**Standard Qualifications: 2 Qualifications**

CII - Certificate in Mortgage Advice

CII - Certificate in Advanced Mortgage Advice

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

## Client Reviews

### Daisy Whateley

#### Whateley Wealth Management Limited



5.0 out of 5

Review from Verified Client

West Midlands | January 2020

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking to buy a house and needed a mortgage advisor and someone to help with insurances and covers which would be needed

#### How did Daisy help you?

Daisy helped us to fill in all the paperwork and advised us on the best things for us. She explained everything fully and made sure we properly understood all of the information. She also helped us fill in medical forms for life and critical illness insurance and completed our decision in principle. She found us a solicitor and compared the best mortgage lenders to ensure we were getting the best deal possible. Daisy also found us someone to complete a survey on the house we have bought. She made the whole process as easy as it possibly could have been

#### Have you seen the outcome you were hoping for?

Everything was sorted quickly and efficiently and for the best price, we were very happy with everything Daisy achieved for us

Review from Verified Client

West Midlands | December 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Buying our first house

**How did Daisy help you?**

Daisy was a great help, providing a friendly service and always on the other end of the phone happy to help whenever we needed her. We really appreciated that Daisy was able to put things in simple terms for us so that we always felt confident we understood the process and could make informed decisions. It was really helpful that Daisy was able to come to us after work so that we didn't have to take any additional time off or rearrange our days.

**Have you seen the outcome you were hoping for?**

Yes, we purchased our first house.

**What could they have done better?**

Nothing - we didn't feel there was anything else we could have asked of Daisy.

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Review from Verified Client

West Midlands | November 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Help to find the best mortgage

**How did Daisy help you?**

She found me my mortgage and not only that helped me find good quote insurances.

**Have you seen the outcome you were hoping for?**

Yes! Brilliant! Im in my new house with no hassle thanks to Daisy helping me through everything.

**What could they have done better?**

I can honestly say nothing. She was great from start to finish. She contacted me through out, giving me updates. Im very grateful for her help and will deffo use her again and again.

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Review from Verified Client

Leicestershire | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was moving house and needed help finding a mortgage.

**How did Daisy help you?**

Daisy did a great job in finding me a mortgage and home insurance.

**Have you seen the outcome you were hoping for?**

Yes, I have a mortgage and Home Insurance and very happy with both.

**What could they have done better?**

I am not sure Daisy could have done anything more or better. My situation was complicated and she worked with me, the lenders & the solicitors to keep things moving along to overcome the different issues/ holdups. She was a massive help to me.

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Review from Verified Client

West Midlands | October 2019

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was going through a divorce and moving into a new family home. I needed support in working out affordability, and a mortgage that gave me the best rates for my needs. Alongside this I also needed mortgage protection and life insurance to cover me and my family.

**How did Daisy help you?**

Daisy provided advice around mortgage affordability and provided a number of options based on my needs. Daisy provided options around mortgage and life insurance in order to find the products that best met my cover and budget needs. Daisy provided a thorough and professional service in order to ensure that high quality products were made available to me,

and that I fully understood their details. Daisy provided a flexible approach to her service, ensuring that we were able to meet face to face outside of normal (9-5) working hours, in order to discuss options and review plans.

**Have you seen the outcome you were hoping for?**

Yes - the both the mortgage and my insurances are suitable for me needs, and ensured that I could get the house that I wanted.

**What could they have done better?**

I felt that Daisy offered a first class service in all areas

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Review from Verified Client Advice: ★★★★★  
Worcestershire | September 2019 Service: ★★★★★  
★★★★★ 5 out of 5 Value: ★★★★★

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

We were looking to move house and wanted advice regarding best mortgages and affordability.

**How did Daisy help you?**

Daisy did all the hard work for us she found us the best deals and presented us with all the information and ensured it was affordable.

**Have you seen the outcome you were hoping for?**

Yes, we moved house earlier this year and have a got a great mortgage deal.

**What could they have done better?**

We've wracked our brains for an answer but are struggling for how things could've gone any better. Would 100% recommend to others.

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Review from Verified Client Advice: ★★★★★  
Worcestershire | September 2019 Service: ★★★★★  
★★★★★ 5 out of 5 Value: ★★★★★

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

First time buyers

**How did Daisy help you?**

Daisy helped us finally become home owners

**Have you seen the outcome you were hoping for?**

Yes

**What could they have done better?**

Nothing. Daisy was very helpful, supportive all the way through the process.

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Review from Verified Client Advice: ★★★★★  
West Midlands | September 2019 Service: ★★★★★  
★★★★★ 5 out of 5 Value: ★★★★★

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

I wanted to purchase my rented house from my private landlord

**How did Daisy help you?**

Daisy gave me all my options in a clear stress free manner. She advised me on how to approach my landlord regarding the possibility of purchasing the property and gave me options regarding life insurance and building & contents insurance.

**Have you seen the outcome you were hoping for?**

100%! My experience with daisy has been nothing but positive.

**What could they have done better?**

Nothing! I have already recommended Daisy to my friends and family and will continue to do so.

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Review from Verified Client Value: ★★★★★  
West Midlands | September 2019 Service: ★★★★★  
★★★★★ 5 out of 5 Advice: ★★★★★

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

Me and my partner were thinking of buying a house but had no idea where to start!

**How did Daisy help you?**

I can't explain how much Daisy helped us. Getting a mortgage is stressful anyway but having someone who explained everything and made sure you understood- no scary language, really takes the edge off. She was always checked in to see how we were and did practically everything for us! She went above and beyond to make sure we were happy with everything and understood the entire process. She was always there to answer any of our questions and our meetings were never uncomfortable or awkward. She's a lovely woman and really is amazing at what she does.

**Have you seen the outcome you were hoping for?**

Yes! We are now comfortably in our lovely house with the cover we need and a mortgage that's right for us. Daisy still checks in to see how we are!

**What could they have done better?**

Nothing- she was perfect and I will recommend her to EVERYONE!

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Review from Verified Client

West Midlands | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyers for a house.

**How did Daisy help you?**

Daisy took into account our circumstances and advised us on what mortgages to go for. She made sure to explain every detail to us in simple terms as we are first time buyers who had no idea where to start! She clearly explained each process of buying a house and kept in regular contact. Daisy remained professional at all times and showed dedication in researching for houses and home insurance.

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

We recently put an offer in for a house which was accepted and Daisy was quick to start the mortgage application straight away the next day. Unfortunately, the sale fell through and Daisy was quick to offer us support and advice. We have now found a new house and are

starting the application again; Daisy has been brilliant with regularly communicating and keeping us informed with each stage of our application. We couldn't be happier with the customer service we have received with Daisy as she has been very friendly and supportive every step of the way.

**What could they have done better?**

I feel there are no improvements needed to be made.

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Review from Verified Client

West Midlands | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Help to choose the best mortgage to suit our needs.

**How did Daisy help you?**

Daisy listened to our needs and requirements and found us the best mortgage to suit our needs, as well as help and advice on life/critical care insurance.

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

Yes.

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Review from Verified Client

West Midlands | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyers on the housing market.

**How did Daisy help you?**

She was clear and concise. She simplified everything and went above and beyond in helping us in anyway possible.

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

Yes 100% Daisy has found us the perfect mortgage for the perfect price. Could not be happier.

**What could they have done better?**

Nothing. Daisy has been professional and approachable from day 1. Always willing to answer any questions even on the weekend out of working hours.

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Review from Verified Client

West Midlands | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were moving house & wanted advice on the best mortgage.

**How did Daisy help you?**

Daisy was very efficient in organising us some mortgage options taking the time & stress out of this for us. We had to pull out of a house following a poor survey but we quickly found another one & daisy was very prompt in changing all of our paperwork so as not to hold up the process of our house sale. She advised us on life insurance & creating a trust for our son & our wills which was something we had been putting off due to timeliness. She has organised us much more cost effective life insurance for little more than what we currently pay out.

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

The mortgage application & insurance policies have all been processed & we are still working alongside Daisy to compile our will but from the previous work she has done for us we are confident this will be successful process.

**What could they have done better?**

Having never worked with a financial advisor before we do not have much comparison so we are very happy with the process. Even when she went on holiday she handed our case over to a colleague so there was no hold up in the processes.

Review from Verified Client

West Midlands | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Fixed rate had come to an end, higher variable rate to pay on mortgage. Also, I had several debts that I was paying a lot of money out on each month. This left me unable to save.

**How did Daisy help you?**

Daisy was super efficient with finding a better mortgage deal and giving me some options with how to manage the debt. I decided to secure the debt against the mortgage because she found such a great rate. Daisy listened, was patient and was both professional and approachable.

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

An even better outcome than I hoped for! I am so thankful to Daisy for giving me and my family this fresh start and am looking forward to saving each month.

**What could they have done better?**

Nothing.

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Review from Verified Client

Worcestershire | October 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We needed a Day 1 Mortgage for a property we purchased outright 2 months previous and we unable to find suitable lenders to meet our requirements.

**How did Daisy help you?**

Daisy saw us within 48 hours of contacting her. She fully understood our situation and the urgency of the situation. And successfully found several products for us including an excellent 5 year fixed rate with no valuation or legal fees.

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

The outcome was far better than we were hoping for.

### What could they have done better?

Daisy was 100% and I do not think she could have done anything better

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Review from Verified Client

West Midlands | June 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Re-mortgage and life insurance.

### How did Daisy help you?

She helped find the right deal for me, sat me down and also offered and supported me in finding the right deal for life insurance.

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

She came back within days of a re-mortgage which I thought would take a few weeks. Quick response and amazing person.

### What could they have done better?

Nothing she did amazing

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Review from Verified Client

Worcestershire | April 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Our fixed rate mortgage was coming to an end - and our previous mortgage advisor left a lot to be desired, so we searched for a new one.

### How did Daisy help you?

Daisy worked through our finances, and explained all the options to us.

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

Yes - we have now re-mortgaged getting exactly what we wanted from the new deal.

### What could they have done better?

N/A

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Review from Verified Client

West Midlands | January 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were looking to move house and a friend recommended Daisy for mortgage advice.

### How did Daisy help you?

Daisy has been brilliant, we honestly couldn't have asked more of her. She understood our goals from the outset and has been able to provide everything without any problems.

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

Absolutely - she kept us up to date at all times and everything was done promptly. I don't think we would have been able to get what we have without her assistance.

### What could they have done better?

Genuinely cannot think of anything - any questions we had were answered, any preferences we had accommodated

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Review from Verified Client

West Midlands | January 2018

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyers wanting advice on mortgages.

### How did Daisy help you?

Daisy was extremely helpful, providing us with all the information we needed to make an assured decision. She explained every step clearly and made the mortgage application process straight forward for us.

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

Yes.

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Review from Verified Client

West Midlands | October 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyer in an unusual offer position requiring in depth knowledge of the variety of mortgage products available.

**How did Daisy help you?**

Daisy was thorough in gaining an understanding of our circumstances and budget and gave us confidence in gaining a mortgage. Daisy offered us products and advice on mortgages which we weren't even aware of which suited our position perfectly. Daisy was also very quick to find answers to our questions and apply for our mortgage.

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

We gained a better outcome than we were anticipating from Daisy.

**What could they have done better?**

Nothing, Daisy was faultless in her work and customer service.

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Review from Verified Client

West Midlands | August 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We wanted to have a fixed mortgage and a better rate.

**How did Daisy help you?**

Daisy gave us fantastic advice and searched for all best deals for us. She explained everything very well and we understood all aspects.

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

Yes definitely, we are extremely happy with the outcome Daisy found for us.

**What could they have done better?**

Nothing, Daisy was very professional at all times, made us feel at ease and communicated effectively with both of us. We will definitely be contacting daisy in the future for other support.

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Review from Verified Client

West Midlands | June 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed to raise finances for home improvements after a recent house move.

**How did Daisy help you?**

Daisy identified the best method (mortgage) and then the best product to raise the required finances, over the most suitable time period and with manageable monthly payments.

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

The most suitable mortgage was quickly identified and recommended, together with legal services, and the mortgage is now set up.

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Review from Verified Client

West Midlands | May 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

As a first time buyer, I came to Daisy seeking some advice on mortgages after getting a mortgage-in-principle from my bank. I'm pleased to say we managed to save a lot of money by finding a much more suitable mortgage.

**How did Daisy help you?**

Daisy's advice has been invaluable - she's always been extremely helpful, responsive, informative and quick (having dealt with estate agents and solicitors, this was a refreshing a much-appreciated change). She also went the extra mile to ensure our appointments could be at a time that worked for me, offering evening and weekend meetings.

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

Absolutely. Daisy managed to provide not just a great mortgage but also a few extra important things I hadn't even considered and all for under the budget we agreed on.

**What could they have done better?**

I honestly can't fault Daisy at any stage of the process.

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Review from Verified Client

West Midlands | May 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

First time buyers needing help to understand mortgages and how to apply for one.

**How did Daisy help you?**

We were able to meet Daisy soon after first getting in contact. We had a very positive first meeting where she was able to get an understanding of our circumstances and what we were wanting to achieve and we were able to understand all that she would be able to help us with. Daisy is an incredibly friendly and approachable person. Prior to meeting her we felt daunted by all the different products and technicalities involved, but she has helped us to understand them with an easy and uncomplicated approach. This, combined with her quick and thorough research of suitable products for us has given us confidence in what we can achieve.

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

Unfortunately unforeseen circumstances have prevented us from completing our application. However Daisy has been fantastic in keeping in touch with us and shown her willingness to continue working with us when our circumstances will finally allow us to apply for a mortgage.

**What could they have done better?**

Nothing, she has been fantastic.

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Review from Verified Client

West Midlands | April 2017

★★★★★ 5 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★

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

Mortgage application.

**How did Daisy help you?**

Daisy agreed to meet with me and my partner within quite a short notice period. She supported us with our mortgage application and looked into the various insurances that we may wish to take out. What we particularly liked about Daisy was her down to earth nature and ability to explain things without using all of the complicated jargon that you would expect. She was very easy to talk to and we did not feel pressured into anything. We were very happy with Daisy's research of the market and it was evident that she had carried this out with our needs in mind.

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

Yes.

**What could they have done better?**

Nothing

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Review from Verified Client

West Midlands | April 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I felt that my previous mortgage advisor did not offer me the best package.

**How did Daisy help you?**

Offered me numerous options and explained each to me clearly.

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

Yes, I have an improved package for a cheaper price.

**What could they have done better?**

Nothing

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Review from Verified Client

West Midlands | March 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

remortgaging of my house.

**How did Daisy help you?**

Daisy took my details, and created an individual plan for my needs. She was very knowledgeable, professional and put me at ease. She provided with options and told me about products that could be helpful for me, some which i did not know were available to me.

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

Daisy sorted all the paperwork and kept me informed the whole way through the process. She found the right product for me and was available whenever I needed her.

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Review from Verified Client

Ceredigion | March 2017

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking to consolidate our finances, and fix our mortgage at a more attractive interest rate.

**How did Daisy help you?**

Daisy helped recommend the most suitable product taking into account our current circumstances and aspirations.

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

Yes. With Daisy's help we have received a competitive mortgage offer, and completed the

mortgage with minimal delay.

**What could they have done better?**

We cannot think of anything that could have been done better.

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