

CATHERINE ROBERTS

Background report to support inclusion
in the **2023 Guide To The UK's Top
Rated Financial Advisers**



Catherine Roberts

THE RIGHT BROKER LTD



Top Rated 2023

5.0 / 5 ★★★★★ 74 reviews

VouchedFor checks:



FCA status: Authorised by Firm



Recent Client Reviews



Whole of Market Protection
Adviser



Positive First Impressions

Services offered



Insurance & Protection

Qualifications listed

Catherine has not added their qualifications to VouchedFor yet. Please ask Catherine for more details.

Client & First Impression Reviews

Catherine Roberts

THE RIGHT BROKER LTD



5.0 out of 5

Review from Verified Client

Midlothian | September 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My wife and I are now retired and had private medical insurance while working so found the transfer to arranging it ourselves quite complicated with exemptions and language unique to this area of service.

How has Catherine helped you?

She compared options and went through each of the benefits very clearly explaining what our options were and why one might suit our needs better than another. She also arranged a 3% "retention discount" which I don't think they would have offered me on my own.

Have you seen the outcome you were hoping for?

Yes all done for another year and not too great an increase in premiums despite some claims in the past year.

What could they have done better?

Nothing really. It does not seem to be a trouble for Catherine to recheck details or find answers to questions if she does not have the answer to hand.

Review from Verified Client

Hampshire | September 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking for the best value medical insurance for my wife and myself.

How has Catherine helped you?

Catherine researched available options, presented us with a choice and answered our questions to help us arrive at the right outcome for us

Have you seen the outcome you were hoping for?

Yes. And the cost so far is affordable.

What could they have done better?

Nothing that I can think of

Review from Verified Client

Midlothian | June 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needing advice regarding most a[ppropriate 9cost and suitability) for private health care services.

How has Catherine helped you?

Did as requested and researched options and provided those with explanations and advice.

Have you seen the outcome you were hoping for?

yes, very much so.

What could they have done better?

Very little, she was pro-active and listened to my questions and preferences.

Review from Verified Client

Nottinghamshire | June 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We have private health insurance.

How has Catherine helped you?

Catherine is always very helpful and always clear on what is included. She is approachable and makes you feel at ease when discussing cover.

Have you seen the outcome you were hoping for?

And more, she managed to secure us a great deal with our current provider and we actually pay a little less than last year!

What could they have done better?

Nothing, she is very good at what she does

Review from Verified Client

West Midlands | June 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

40% premium increase demand from existing health insurer caused me to check the market competitors and I needed a specialist in the sector to help

How has Catherine helped you?

Fully explained the products available in the sector. Advised on the providers and made detailed comparisons of their offerings thus helping me to choose the most relevant provider for my needs. Before contacting Catherine, I had been recommended by a comparison website to buy a product that was wrong for me, they had given me incorrect information. Catherine's experience and factual product knowledge ensured that I did not make this purchase.

Have you seen the outcome you were hoping for?

Very much so, an excellent result

What could they have done better?

Nothing

Review from Verified Client

Midlothian | May 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My insurance advisor passed away suddenly and Catherine took over.

How has Catherine helped you?

Catherine carried out a review at our renewal date. The time and work she put into reviewing the market and making sure that we understood and were happy with alternatives was amazing. Catherine was always available for queries and made the transition to a new insurer a smooth exercise. We would highly recommend her.

Have you seen the outcome you were hoping for?

Yes we did.

What could they have done better?

Nothing that we can think of at all.

Review from Verified Client

Essex | May 2023

★★★★★ 4.7 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★☆

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

I needed health insurance and needed someone to help me pick one that suits me.

How has Catherine helped you?

She went through different policies and chose the best one for me for my health insurance.

Have you seen the outcome you were hoping for?

Yes, I had the best insurance picked.

What could they have done better?

Nothing

Review from Verified Client

West Sussex | May 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Policy Renewal

How has Catherine helped you?

Review of market versus existing plan including options.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Suffolk | May 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Original adviser no longer available.

How has Catherine helped you?

She has given sound advice and has always been sympathetic to our needs.

Have you seen the outcome you were hoping for?

Yes, Catherine has always advised us in ensuring that we have had the best outcome possible year on year.

What could they have done better?

Nothing

Review from Verified Client

Swansea | May 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking for Private Medical insurance, I was not familiar with it so sought a professional to give advice. Catherine was brilliant.

How has Catherine helped you?

She asked about my needs and found an insurer who best matched them.

Have you seen the outcome you were hoping for?

Yes, but not claimed but as I'm with a well known insurer I'm more than confident in help should I need to claim.

What could they have done better?

Nothing. Professional, polite, understanding.

Review from Verified Client

Angus | March 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were considering private health insurance and Catherine came highly recommended.

How has Catherine helped you?

Sourced products and presented the options that met our requirements. Despite having issues with our application for our chosen provider, Catherine investigated suitable alternatives and provided outstanding support and guidance throughout.

Have you seen the outcome you were hoping for?

We have and are now covered appropriately for our needs.

What could they have done better?

Not applicable. Service has been outstanding!!

Review from Verified Client

Tyrone | February 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was renewing my private health insurance policy

How has Catherine helped you?

Catherine has negotiated the most appropriate health cover to meet my needs at the best price

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Catherine has been excellent and could not have done any more for me

Review from Verified Client

Tyne and Wear | February 2023

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Catherine was very helpful and patient with us when we setting up our Healthcare benefit for our staff.

How has Catherine helped you?

as above

Have you seen the outcome you were hoping for?

yes we are all signed up - thank you

Review from Verified Client

East Sussex | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking for medical health insurance that was tailored to my specific needs.

How has Catherine helped you?

Catherines expert knowledge and genuine desire to secure the best value policy for not only met, but exceeded my requirements!

Have you seen the outcome you were hoping for?

I now have an excellent policy in place with an insurance provider that meets my needs at a much lower premium than I was quoted by anyone else!

What could they have done better?

Very happy, thank you Catherine

Review from Verified Client

Cardiff | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Not having the time to look at the medical insurance market and asking an expert to do this for me.

How has Catherine helped you?

By obtaining the best quote for medical insurance

Have you seen the outcome you were hoping for?

Yes better than I was hoping for.

What could they have done better?

No

Review from Verified Client

Tyrone | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted private health insurance appropriate to my needs at the best value for money

How has Catherine helped you?

Catherine has provided me with cost comparisons from a range of providers which enabled me to choose one suitable for me

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Catherine has been excellent and I would highly recommend her to anyone seeking advice re health insurance

Review from Verified Client

Northamptonshire | December 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I wanted to get the best deal

How has Catherine helped you?

She thoroughly searched the market and compared the deals and got me the best one.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Surrey | October 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★

l7.848,5.062a1.447,1.447,0,0,0,2.172-1.593l-2.348-9.062A1.462,1.462,0,0,1,225.52,19.761Z" transform="translate(-199.939 0)" fill="#4BC1CA" /> ★★★★★

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

I was dissatisfied with my existing medical insurance and needed detailed advice on a policy more tailored to my needs.

How has Catherine helped you?

She has provided excellent advice and has given me an understanding of how medical insurance works which I never had before. She has recommended a medical provider and policy which not only suits my needs but will save me money.

Have you seen the outcome you were hoping for?

Absolutely.

What could they have done better?

I cannot think of a single thing. Not only has her advice been thorough and detailed but it is also evident that she is passionately committed to providing impartial advice and providing a product that is utterly suited to her clients' needs.

Review from Verified Client

Hampshire | October 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My daughter recommended Catherine as someone to help find the right medical insurance for my wife and me, both over 70. We were looking for the best value cover which addressed our needs as I felt our then current cover was too expensive.

How has Catherine helped you?

Catherine started by exploring in depth what we wanted and what we could do without. As a result, she recommended we change provider which we did at a considerable cost saving and without sacrificing any cover that was important to us. We looked again at another option for this year where she had done considerable research and after further discussion decided to remain with our current provider.

Have you seen the outcome you were hoping for?

Absolutely. We are very happy with where we are now and I am 100% confident of her advice. She is a delight to deal with. She is proactive without in any way being pushy and is extremely responsive to emails and phone calls.

What could they have done better?

Nothing.

Review from Verified Client

London | September 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Catherine took over from previous advisor and has been very helpful and hands on

How has Catherine helped you?

Better health insurance policy and costs

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Bedfordshire | September 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Seeking new broker for private medical insurance for our company.

How has Catherine helped you?

She obtained and advised on new PMI terms for us.

Have you seen the outcome you were hoping for?

Yes we were very pleased. Catherine was very professional and thorough.

What could they have done better?

Nothing.

First impression from a user who is not yet a client

August 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Catherine

Catherine was friendly, well-informed and focused. She helped me understand several alternatives and to sort the data to make a decision.

Review from Verified Client

East Sussex | July 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To assist and advise in the process

How has Catherine helped you?

Clear advice and efficient process

Have you seen the outcome you were hoping for?

Yes a policy more appropriate for me.

Review from Verified Client

Antrim | July 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

A change in job meant I needed to set up private health insurance.

How has Catherine helped you?

Catherine has given me great advice on what policies will suit me best and give me good value and keeps in touch to make sure everything is up to date and working as it should.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing! Great service.

Review from Verified Client

West Sussex | July 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

With the continuing issues with being seen within the NHS in a timely manner, I decided to search for suitable private health cover for the family.

How has Catherine helped you?

Catherine was able to look at both private and company schemes for me and in doing so provided a comparison chart for clarity. The result being Catherine came up with the right cover and at a very reasonable monthly premium compared to my own searches online and via other brokers.

Have you seen the outcome you were hoping for?

Yes, the outcome is we are now secure in the knowledge we have the right protection for the family when it comes to healthcare.

What could they have done better?

In fairness there is nothing Catherine could have done better.

Review from Verified Client

Oxfordshire | June 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Following the global pandemic I was looking for high quality but affordable health insurance for me and my family.

How has Catherine helped you?

Catherine was instrumental in explaining all of my options, giving me a very detailed breakdown on the products available. This made my decisions informed and hassle-free.

Have you seen the outcome you were hoping for?

Yes, absolutely!

What could they have done better?

Nothing. We are very happy with the service provided.

Review from Verified Client

London | June 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking for someone who has detailed market knowledge and can offer me bespoke advise

How has Catherine helped you?

She asked what is important for me and based on that information she found me the best health insurance

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

n/a

Review from Verified Client

Midlothian | May 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My business healthcare policy was up for renewal and I was looking for an advisor to provide an independent review.

How has Catherine helped you?

Catherine reviewed the market and provided quotes allowing us to choose the right policy to suit her needs. Her attention to detail, quick and reliable communications and knowledge of the market was amazing. I look forward to our continued relationship as our account manager.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

I cannot fault Catherine in any way as we are pleased with both her and the outcome.

Review from Verified Client

Antrim | May 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Our company was expanding and we wanted to offer health insurance to help look after our employees and aid employee retention.

How has Catherine helped you?

She held our hand through the process, explained the various options and using her experience helped us select the policy required when we weren't even sure what we wanted or needed.

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

Middlesex | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

current health insurance was too high.

How has Catherine helped you?

She provide best quote in market and reduced monthly premium

Have you seen the outcome you were hoping for?

Yes

Review from Verified Client

South Yorkshire | April 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Complexity of products together the number of differing products in the market.

How has Catherine helped you?

She has given professional and sound advice. She has sorted out products that were they best

for each of us.

Have you seen the outcome you were hoping for?

Yes, 100%.

What could they have done better?

Nothing

Review from Verified Client

Midlothian | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My previous advisor sadly passed away and Catherine was recommended as a replacement.

How has Catherine helped you?

She helped to significantly reduce the annual premium quotation that I had received for my Health Insurance (in doing so she looked at other options in the marketplace and also negotiated a reduction from the current supplier) . Thereafter discussed with me options to better tailor the Health Insurance policy to further reduce costs whilst better meeting my needs.

Have you seen the outcome you were hoping for?

Yes; a better - more appropriate - policy, at a reduced cost.

What could they have done better?

Frankly nothing; I was impressed by the level of service, the timeliness of response and the helpful friendly professional manner.

Review from Verified Client

West Sussex | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Reviewing my private health insurance

How has Catherine helped you?

Her advice has been good. She reviewed my policy, compared it to the market and advised me accordingly

Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Northamptonshire | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Change in employment

How has Catherine helped you?

Catherine found me life insurance, critical illness and income protection and helped me understand how each product would benefit me.

Have you seen the outcome you were hoping for?

Yes - better than expected.

What could they have done better?

Nothing, Cat gave me brilliant support

Review from Verified Client

Nottinghamshire | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

General private medical care

How has Catherine helped you?

Excellent advise and pointers into which product suited my needs best

Have you seen the outcome you were hoping for?

100%

What could they have done better?

Catherine did her job very efficiently and and couldnt have asked for anything more

Review from Verified Client

Suffolk | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Wanting the best cover for Private Health Insurance that suited our needs at a reasonable premium.

How has Catherine helped you?

Catherine has obviously researched the best possible deal taking into account our past and present medical conditions.Her advice on all aspects of the cover needed has been explained fully.

Have you seen the outcome you were hoping for?

Yes the outcome has been most acceptable.

What could they have done better?

Nothing

Review from Verified Client

Tyrone | March 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed private health insurance

How has Catherine helped you?

Catherine is pleasant, professional and very helpful. She has explored different options to find the most appropriate private health insurance cover for me at the best financial cost

Have you seen the outcome you were hoping for?

Yes. I have been completely satisfied with the outcome

What could they have done better?

Nothing I can think of

First impression from a user who is not yet a client

February 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Catherine

She replaced our previous advisor and is excellent. She coordinates our company medical insurance quickly and efficiently.

Review from Verified Client

Newport | January 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I asked my mortgage adviser if she could recommend a health care adviser.

How has Catherine helped you?

Catherine was recommended to me some years ago and ever since she has assisted me with arranging my private health care cover. She has ensured comparable quotations from all providers offering my required cover are provided to me at each renewal, she is an extremely diligent professional, nothing is too much trouble and she goes above and beyond to assist. I

would not hesitate in recommending Catherine.

Have you seen the outcome you were hoping for?

Yes every year.

What could they have done better?

No.

First impression from a user who is not yet a client

January 2022

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Catherine

Catherine is very professional and a pleasure to work with. I will be recommending her to my clients and family for sure!

Review from Verified Client

Tyrone | January 2022

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I was looking for advice about health insurance

How has Catherine helped you?

She is a good listener. She understood my needs and recommended a policy to meet my requirements at a value for money cost

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

I honestly cannot think of anything

Review from Verified Client

London | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I did not have health insurance privately.

How has Catherine helped you?

Help me find a good deal.

Have you seen the outcome you were hoping for?

Yes.

Review from Verified Client

Lincolnshire | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I thought it was the right time to look into private healthcare

How has Catherine helped you?

Excellent service from Catherine provided me with all the information I needed to make a decision on the best policy and answered any questions that I had.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

I am very satisfied and would recommend to others so nothing.

Review from Verified Client

West Midlands | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Looking for a family health insurance policy

How has Catherine helped you?

Amazing service and bespoke to our needs. Catherine is extremely helpful and knowledgeable within her field, giving us the best quote for what was required.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

There was nothing she could have done better.

Review from Verified Client

West Midlands | November 2021

★★★★★ 5 out of 5

Service: ★★★★★

Advice: ★★★★★

Value: ★★★★★

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

I needed advice in an area I am not familiar with

How has Catherine helped you?

She walked me through the whole process, clearly explained

Have you seen the outcome you were hoping for?

Absolutely

What could they have done better?

Nothing, Catherine is amazing

Review from Verified Client

London | November 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My private insurance premium was too high

How has Catherine helped you?

she gave invaluable advice and succeeded in renewing my policy on very favorable terms

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

I am satisfied with the outcome

Review from Verified Client

Kent | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Didnt have any

How has Catherine helped you?

By getting the best offer at the best price

Have you seen the outcome you were hoping for?

Absolutely

What could they have done better?

Not at all, brilliant service

Review from Verified Client

Oxfordshire | October 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Private Health insurance

How has Catherine helped you?

Catherine was so helpful and efficient and no question or query was too much trouble for her. I would highly recommend Catherine.

Have you seen the outcome you were hoping for?

Yes, my Private Health insurance is now in place and meets my needs perfectly.

Review from Verified Client

Midlothian | September 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Death of previous PMH agent

How has Catherine helped you?

Took over case file and d planned options fully.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

East Sussex | September 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To ensure that I was getting the most appropriate policy for my needs and the most cost efficient.

How has Catherine helped you?

She took the time to understand my needs and requirements and then provide a solution that met these.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

First impression from a user who is not yet a client

September 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Catherine

Catherine has been absolutely amazing throughout. She has explained everything really clearly, advised me the best products and all the advantages and disadvantages of each product. once I had started, she ran through how to set up the app and get the most out of it when most other agents would have been paid and not interested. Nothing is to much and cant recommend Catherine enough

Review from Verified Client

Essex | August 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Can afford private health and wanted to get suitable cover for my partner and my two children.

How has Catherine helped you?

Gave advice and options. Explained the differences and pros/cons.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

First impression from a user who is not yet a client

August 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Catherine

Catherine clearly has a thorough understanding of the private medical insurance market and was quickly able to help me select the best policy for my particular circumstances. Her clear and independent advice was very reassuring and I will definitely contact her again in the future. I will happily recommend Catherine to others seeking help to choose health insurance.

Review from Verified Client

Surrey | August 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Needed advice

How has Catherine helped you?

Gave the best advice and took care of everything

Have you seen the outcome you were hoping for?

Yes definitely

What could they have done better?

Perfect in every way

First impression from a user who is not yet a client

June 2021

★★★★★ 5 out of 5

Please provide a brief comment about your experience with Catherine

Very professional and prompt and sound advice

Review from Verified Client

Antrim | June 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

New job and wanted health insurance

How has Catherine helped you?

Found different policies and explained the advantages/disadvantages of each

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Oxfordshire | June 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

The pandemic has made us anxious about health care so we have looked at private health insurance

How has Catherine helped you?

Catherine worked to find us the best possible plan based on our family requirements

Have you seen the outcome you were hoping for?

Absolutely! Catherine came back with a number of options based on our requirements and she was able to tailor the optimal plan from these to work for us.

What could they have done better?

Nothing. Catherine has been excellent from start to finish!

Review from Verified Client

London | May 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

needed new health insurance and advice from an expert

How has Catherine helped you?

She really understands the market, providers and the services they provide but most importantly, she really makes sure as a customer you get what you looking for.

Have you seen the outcome you were hoping for?

yes

What could they have done better?

n/a

Review from Verified Client
West Sussex | May 2021
★★★★★ 5 out of 5

Service: -3.4-8.779a1.4441.444.0.0.0-2.7.0.3.4.8.744a1.453.1.453.0.0.1-1.261.92.9.284.567a1.459.1.459.0.0.0-
Value: ★★★★★

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

Annual Renewal and not reviewed wider market since taking out original policy 2 years ago.

How has Catherine helped you?

Opened up wider market but without me having to speak to numerous insurers for T&C's. Experience and explanation of provider terms and the multiple approaches we could use to obtain the right cover at the right price.

Have you seen the outcome you were hoping for?

Yes as comprehensive cover (probably more so) at a lower price.

What could they have done better?

Can't see how !

Review from Verified Client
West Midlands | May 2021
★★★★★ 5 out of 5

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

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

Im getting older and I just didnt want to worry if anything happened to me.

How has Catherine helped you?

She gave me the best deal on the vitality insurance.

Have you seen the outcome you were hoping for?

I have not used it yet.

What could they have done better?

Nothing at the moment

Review from Verified Client

Middlesex | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

To get best insurance policy

How has Catherine helped you?

She search in market and comparison and advised us difference of different provider

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

She done best

Review from Verified Client

Berkshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Our health insurance policy was up for Renewal (which we completely forgot about) Catherine reminded us to assist on our renewal,

How has Catherine helped you?

My husband and I purchased health insurance recommended by Catherine last year, since we have ventured into purchasing an investment property we were looking to keep costs down, Catherine searched for a policy according to our needs and lower than our budget with a huge recognised brand

Have you seen the outcome you were hoping for?

We have not needed to use our health insurance yet, but Catherine has been very helpful in explaining finer details and ensuring we are at ease

What could they have done better?

I'm very happy with the services provided

Review from Verified Client

Surrey | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Life insurance.

How has Catherine helped you?

Found a policy tailored to my needs and circumstances.

Have you seen the outcome you were hoping for?

Yes.

What could they have done better?

Nothing - the service was extremely professional.

Review from Verified Client

Middlesex | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

LOOKING FOR A GROUP LEAVER HEALTH POLICY

How has Catherine helped you?

SHE FOUND A SUITABLE ALTERNATIVE AND MADE A STRESSFUL TIME STREE FREE

Have you seen the outcome you were hoping for?

YES, THANK YOU VERY MUCH

What could they have done better?

N/A

Review from Verified Client

Middlesex | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I needed a follow policy for my health insurance and Catherine came highly recommended

How has Catherine helped you?

She listened to my dilemma and responded with several options.

Have you seen the outcome you were hoping for?

yes, indeed. Thank you

What could they have done better?

n/a

Review from Verified Client

Sussex | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Renewal of health insurance.

How has Catherine helped you?

She gave good advice, and was very helpful in reviewing my present health insurance.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Renfrewshire | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

I am self employed and wished sick pay cover and also life insurance

How has Catherine helped you?

Catherine, gave me informative advice and took on board, my monthly limit re cost when seeking options, was informative of aspects that were important that I hadn't thought of.

Have you seen the outcome you were hoping for?

Yes. Both policies were organised and within budget. Although I was not proactive on my responses, Catherine was patient and encouraging without being pushy and overwhelming.

What could they have done better?

Everything was done as I wished. No issues raised.

Review from Verified Client

Surrey | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

NHS waiting lists and realised that stuff starts to fail in your body as you age and actually I'd rather get it sorted now not when I'm told.

How has Catherine helped you?

Exemplary, knowledgeable, impartial and understanding

Have you seen the outcome you were hoping for?

So far, not costing the earth so pleased

What could they have done better?

Nothing could have been done better.

Review from Verified Client

Surrey | April 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

We were looking to introduce a private healthcare scheme

How has Catherine helped you?

Catherine was knowledgeable, friendly and super efficient. Very happy with the service she has provided and the resulting product that she has achieved for us

Have you seen the outcome you were hoping for?

Yes we love the Vitality scheme

What could they have done better?

Nothing - Catherine is very pro-active and efficient

Review from Verified Client

Cardiff | March 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

My friend who looked after my health insurance recommended Catherine after he finished offering the service.

How has Catherine helped you?

Catherine is extremely helpful and knowledgeable and has been able to obtain the best deal for the Company for the last two years. I have no hesitation in recommended her services to any company requiring Private Health Insurance.

Have you seen the outcome you were hoping for?

Yes

What could they have done better?

Nothing

Review from Verified Client

Ceredigion | March 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

very high quote from existing health ins. and recommendation from my partner

How has Catherine helped you?

A great service, I felt very empowered by our conversations and appreciated being taken point by point through a comparison with my existing insurer. Catherine made the whole process smooth and efficient and I am already recommending her to others.

Have you seen the outcome you were hoping for?

yes a big saving and great service from Catherine

Review from Verified Client

South Yorkshire | March 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Private medical insurance costs were escalating and I was having difficult contacting anyone about it. I felt the situation was running away from me and was beginning to feel hassled and irritated with the whole enterprise. Catherine was recommended to me as a broker and would be able to resolve matters, compare prices, compare providers and generally take on what was becoming a real pain.

How has Catherine helped you?

Excellent service, delivered in a personable but highly professional manner. She shouldered the issues outlined above. Kept me up to date with developments consulted, laid out options and advised as appropriate. Instinctively I felt that she was a lady we could trust to do her best for us

Have you seen the outcome you were hoping for?

Yes I believe my wife and I did. The level of outlay and cover was perfectly satisfactory

What could they have done better?

On the face of it nothing. Advice was both sound and timely. Outcome as I've said was what we wanted. Correspondence and contact was prompt and she was always available for consultation. She was just as importantly patient and professional. I'm not sure what Catherine could have done further. We will be using her again.

Review from Verified Client

Blaenau Gwent | March 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Recommend from a highly valued individual

How has Catherine helped you?

Catherine is extremely professional and makes the whole process easy! We wouldn't go anywhere else and will continue to recommend her services.

Have you seen the outcome you were hoping for?

Yes.. definitely!

What could they have done better?

Nothing at all, Catherine was perfect.

Review from Verified Client

Suffolk | March 2021

★★★★★ 5 out of 5

Advice: ★★★★★

Service: ★★★★★

Value: ★★★★★

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

Private Health Insurance.Premiums had increased significantly so Catherine was asked to find a better deal to suit my requirements.

How has Catherine helped you?

Catherine was very sympathetic to my needs and her recommendations were fully explained . She also followed up a query I had with my insurance provider to my total satisfaction. Throughout all our recent communications she has treated me like a valued human being . Thank you Catherine, you are an asset to your company.

Have you seen the outcome you were hoping for?

Yes. The deal brokered by Catherine suited my needs better.

What could they have done better?

Nothing

Read more reviews at

<https://www.vouchedfor.co.uk/protection-advisor/camberley/064201-catherine-roberts/reviews>