

INTRODUCING

Kevin Cassar



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Kevin has held various senior roles in both business operations and compliance as well as advisory, during this time he has accumulated a wealth of experience dealing with high-net-worth clients living across Europe and the UK.

He is a highly qualified and respected professional with over 20 years of experience in the field of wealth management. After graduating in 2001 with an Honors Degree in Banking & Finance, he later completed his Diploma for Financial Advisers (DipFA) through the UK Institute of Financial Services (UK IFS).

Kevin is passionate about client centricity and holds a high degree of knowledge on Investments, Trusts and Estate Planning. His in-depth understanding of cross-border taxation has been of invaluable help for his clients overcoming the challenges faced by many expatriates when moving countries.

In 2021 Kevin joined Chase Buchanan as a Regional Manager. Throughout his career he has always operated within a highly regulated framework and over the years has been authorized and regulated by the UK Financial Conduct Authority, the Malta Financial Services Authority (MFSA), and more recently via Chase Buchanan by the Cypriot regulated (CySEC) in Europe.

Kevin is married to Juliana, and they have a daughter, Lara. During his free time, he enjoys football, travelling and spending time with his family and friends.

WHAT OUR CLIENTS HAVE TO SAY

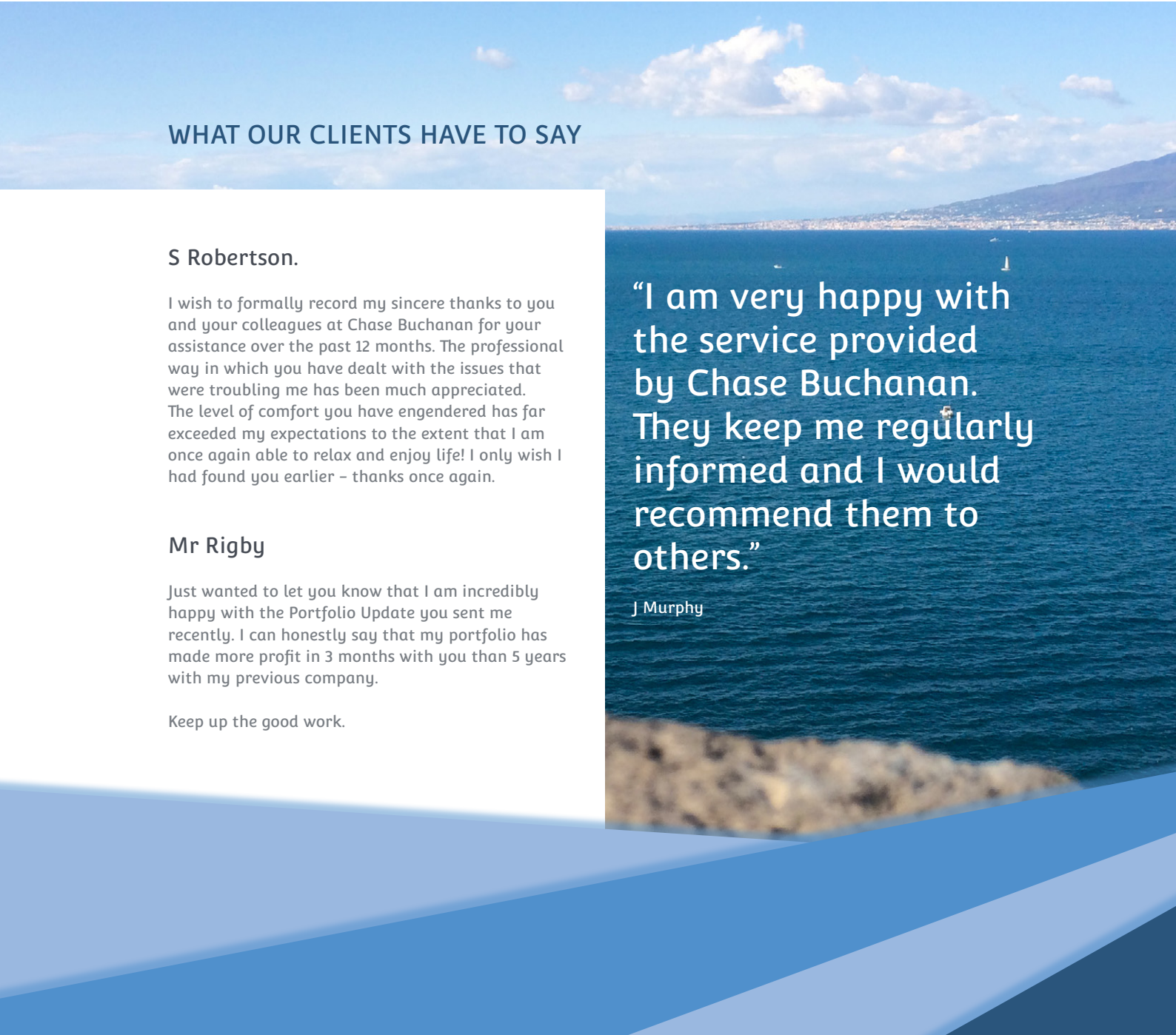
S Robertson.

I wish to formally record my sincere thanks to you and your colleagues at Chase Buchanan for your assistance over the past 12 months. The professional way in which you have dealt with the issues that were troubling me has been much appreciated. The level of comfort you have engendered has far exceeded my expectations to the extent that I am once again able to relax and enjoy life! I only wish I had found you earlier – thanks once again.

Mr Rigby

Just wanted to let you know that I am incredibly happy with the Portfolio Update you sent me recently. I can honestly say that my portfolio has made more profit in 3 months with you than 5 years with my previous company.

Keep up the good work.



“I am very happy with the service provided by Chase Buchanan. They keep me regularly informed and I would recommend them to others.”

J Murphy

Kevin Cassar
Private Wealth Manager
chasebuchanan.com

Kevin is qualified to advise in all facets of personal financial planning including:

Retirement planning

Lump sum savings

Investment planning

Education fee planning

Critical illness and family protection

QROPS and SIPPS

About Chase Buchanan Ltd

Chase Buchanan retains its independence through private ownership, so no bank, insurance company or financial institution influences the products we offer or the advice we give, we work purely in the interest of clients.

We strive to provide the best level of service in the industry which means having the right regulations, the right structure and the right people.

Our mission is to help our clients plan for their future and provide insight and advice that enables them to achieve their life goals. We provide clear, unbiased, jargon-free advice and unparalleled ongoing support and reviews.

Kevin welcomes anyone with an interest in creating a financial plan, or anyone with existing plans in place in need of review, to contact him directly:

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Trusted advice made simple

TALK WITH KEVIN

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