

INTRODUCING

Phil Morris ACSI



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Phil focuses on the particular needs of expatriate professionals based in Portugal and the EU, his expertise includes intimate knowledge of the UK pensions industry and strategic tax positioning.

He counts Germans, Italians, Spaniards, Belgians, Norwegians, Swedes, Americans, and fellow Brits amongst his client base.

Being a Private Wealth Manager with Chase Buchanan gives him privileged access to the most successful solution providers around the globe today. He is a EU level 5 and UK level 4 qualified Financial Adviser which means truly client focused planning.

Phil Morris
Private Wealth Manager
chasebuchanan.com

Part of a comprehensive plan may involve the introduction of international savings & investment plans, tax efficient investment platforms, pension consolidation and IHT mitigation.

Providing a flexible solution is important to Phil. Whether you are a high-net-worth individual looking to invest a large lump sum, or a regular monthly saver with a more modest savings goal in mind; Phil is extremely confident that the solutions he could introduce represent a competitive and compelling proposition.

His early career saw him undertake roles with NatWest Bank and Nestlé after which he went on to become a significant contributor in the growth of a PC company, he subsequently established and sold several companies. After becoming increasingly frustrated with his own financial advisers and driven by a passion to maximize his own portfolio in a safe and secure way he moved into the financial advisory industry himself.

He has worked in the USA, China, Switzerland and most recently Portugal, where he now very much considers home. Phil thoroughly enjoys and gets a huge amount of satisfaction from helping others and would welcome the opportunity to discuss any areas where he can provide assistance and value.

WHAT PHIL'S CLIENTS HAVE TO SAY

Jo McFarland

Sainsbury's Country Manager

I am very happy with the help, advice and support I have had from my representative, Phil Morris. My investments are all moving in an upward trajectory due to Phil's sound and well researched advice whilst balancing this with my requirement for a medium risk portfolio.

Phil communicates with me on a regular basis with face to face interaction which is so often avoided in today's world! Thank you, Phil.

Fredrik Barner

General Manager, Mid American Overseas Inc.

Phil Morris approached me in a very professional and trustworthy way from the beginning. Financial planning is all about trust and people relationship. It took a while (2 years) before I actually decided to start and its the best decision so far, I made. My only regret is that I didn't do it earlier and I can highly recommend Phil to anyone who wants to set up a financial plan for a better future. I'm impressed by his commitment and strong personal attributions to make it successful and the outcome has been excellent. Phil is your guy to make it happen based on your goals and strategy. I highly recommend him from a professional and personal point of view!

As well as providing a range of solutions for existing savings, Phil has helped me get my UK pension back on track and we have moved forward with a few ideas that should provide some great retirement possibilities in the not-too-distant future!

– I would recommend him as a safe pair of hands regarding your private financial investments.

Mr J. Crawshaw
Director of Operations

Phil Morris
Private Wealth Manager
chasebuchanan.com

Phil 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.

Phil 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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M UK: +44 7793 818 293

Trusted advice made simple

TALK WITH PHIL

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