

INTRODUCING

John Martins APP ACSI



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Born and raised in
the Algarve,
John graduated
from Algarve
University with
a B.Sc. degree
in Business
Management and
a Post-Graduate
degree in Finance.

Prior to joining Chase Buchanan's UK office as a Private Wealth Manager, he was a Wealth Manager and Investment Committee member at a Gibraltar-Portugal Wealth Management firm for 2.5 years and spent 3 years as an International Financial Advisor in the Algarve before that. John also obtained relevant experience in Corporate Finance and Equity Research from his Analyst roles at Investment Banking boutiques in London.

John is extremely passionate about financial planning and strongly believes that ethics and cost transparency, coupled with financial advice based on academic research, is the best way to achieve long term client satisfaction. As a member of the Portuguese Order of Economists, John has spoken at several investment conferences, and often writes articles on various topics, ranging from the state of global financial markets, the Algarve real estate market and the Algarve/Portuguese economy.

John holds several relevant professional qualifications in financial services, among them:

- ACSI – Associated Member of the Chartered Institute for Securities & Investment
- Level 4 Certificate in Paraplanning with the Chartered Institute for Securities & Investment
- Level 4 Investment Advice Diploma with the Chartered Institute for Securities & Investment
- Capital Markets & Securities Analyst with the Corporate Finance Institute
- Financial Planning & Wealth Management with the Corporate Finance Institute
- Investment Foundations Certificate with the CFA Institute

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

John Martins
Private Wealth Manager
chasebuchanan.com

John 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.

John 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 JOHN

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