

A professional headshot of Joseph Harker, a man with short, dark hair, wearing a dark suit jacket, a white dress shirt, and a dark tie with small white polka dots. He is looking directly at the camera with a slight smile. The background is a solid dark blue.

INTRODUCING

Joseph Harker

ACSI DipFA STEP Affiliate

Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Joseph Harker  
Private Wealth Manager  
chasebuchanan.com

## Joseph started his career in private client investment management at JM Finn in 2016.

After initially moving across into holistic financial advice with Quilter in 2020, he joined Chase Buchanan in 2024. Joseph now provides bespoke financial planning and investment management advice to a wide range of clients internationally, helping them to navigate the complexities of personal finance and investments with confidence and peace of mind.

Whether your goal is to maximise your income and lifestyle in retirement, provide for your children's future, create a clear estate succession plan or to address more complex family issues, Joseph aspires to provide comprehensive and transparent advice that you can always rely on.

Joseph takes great pride in delivering a highly bespoke and personal service, ensuring that each client receives tailored solutions that align with their unique financial goals and circumstances. He is available to discuss with you any investment opportunities that may arise in the markets and can also act as a sounding board on a broader range of financial issues, depending on your specific needs and requirements.

By dividing your wealth into different 'pots', each with a range of objectives driven by accessibility, target returns and risk tolerance, Joseph believes that it is possible to simplify the financial challenges that each investor faces with a clear financial plan that both protects and cultivates wealth across generations.

Joseph believes that as responsible custodians and skilled stewards of our clients' capital, investing with a sensible, focused and patient approach is the best way to earn your trust as a dependable partner over the long term.

Chase Buchanan clearly stood out to Joseph as a market leader in global financial advice, being both a highly regulated and privately owned company. This means we enjoy committed leadership and a long-term vision to be the best Private Wealth Management company in our industry.

Joseph holds the QRF Level 6 Financial Markets paper from the Chartered Institute for Securities & Investment, the QRF Level 4 Diploma for Financial Advisers from the London Institute of Banking & Finance and the QRF Level 4 Investment Advice Diploma from the Chartered Institute for Securities & Investment. Joseph is currently studying to take the STEP Advanced Certificate in International Trusts: Law and Practice exam in November 2024.

Outside of work, Joseph enjoys playing trombone in several jazz groups with his brothers, as well as mountain hiking, batting middle of the order for Sidcot Cricket Club, tennis, fitness and reading books.

## 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

Joseph Harker  
Private Wealth Manager  
chasebuchanan.com

Joseph 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.

Joseph 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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TALK WITH JOE

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