

INTRODUCING

Richard Duncan DipPFS



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

**Richard Duncan**  
Private Wealth Manager  
chasebuchanan.com

Richard is originally from Lancashire in the north-west of England and has worked in Financial Services since 2004. Having worked for an Accountancy firm and two Chartered IFA firms whilst in the UK, Richard has an in-depth knowledge of Financial Planning and Wealth Management.

Richard decided to relocate to Andalucia on the south coast of Spain to further his career and knowledge in September 2019 and is approaching 5 years as a Wealth Manager in Spain.

Richard is a driven and detailed Financial Planner with a proven track record of providing comprehensive financial guidance and strategies to individuals worldwide. With 20 years of experience in the Financial Services industry, Richard possesses a deep understanding of investment products, tax regulations, retirement planning and wealth management.

Richard's approach is client-centric, focusing on building long-term relationships based on trust and transparency. He excels in conducting thorough financial assessments to identify clients' goals, risk tolerance, financial constraints and then tailors personalised financial plans to meet their specific needs. Combining exceptional analytical ability with excellent communication skills, Richard has a knack for translating complex financial concepts into clear, actionable recommendations. He is adept at guiding clients through market fluctuations, adapting strategies to changing circumstances and continuously monitoring and adjusting portfolios to ensure optimal risk rated performance.

As a passionate advocate for financial literacy, Richard is committed to empowering clients with the knowledge and tools they need to make informed financial decisions. Whether it's retirement planning, investment management, estate planning or tax mitigation, Richard has dedicated his career to helping clients achieve financial security and peace of mind.

Outside of work, Richard is extremely sporty and regularly plays Football (7 and 11 a side), Tennis, Padel and Golf. Whilst not in the office or on the sports field, he enjoys travelling the world, exploring Spanish culture and traditions with his partner Sadie and meeting new and interesting people.

## 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

Richard Duncan  
Private Wealth Manager  
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Richard 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.

Richard 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 RICHARD

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