

INTRODUCING
Tatiana Bateson



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

With close to 20 years' experience advising international clients, Tatiana specialises in wealth management for those relocating between the UK and France – offering bespoke, cross-border strategies that protect, grow, and optimise complex financial portfolios.

Tatiana has held senior advisory roles at leading institutions including Fidelity International, Credit Suisse, and Barclays Wealth. Over the years, she has guided entrepreneurs, executives, and multi-generational families through investment structuring, cross-border pension planning, and tax optimisation, ensuring every solution is aligned with her clients' long-term objectives and global lifestyle. Her advice is rigorous, discreet, and deeply personalised.

Now based in France, Tatiana combines institutional expertise with her own expatriate experience. Having navigated relocation with her family, she understands the nuanced financial and personal challenges that come with such a move. This dual perspective allows her to offer strategic advice on managing UK and French financial obligations, delivering clarity and confidence in unfamiliar territory.

Tatiana is RDR Level 4 qualified and holds both the Diploma in Investment Advice and the IMC. Her clients value her ability to turn financial complexity into lasting peace of mind. Away from work, she enjoys France's cultural richness and natural beauty with her family.

WHAT OUR CLIENTS HAVE TO SAY

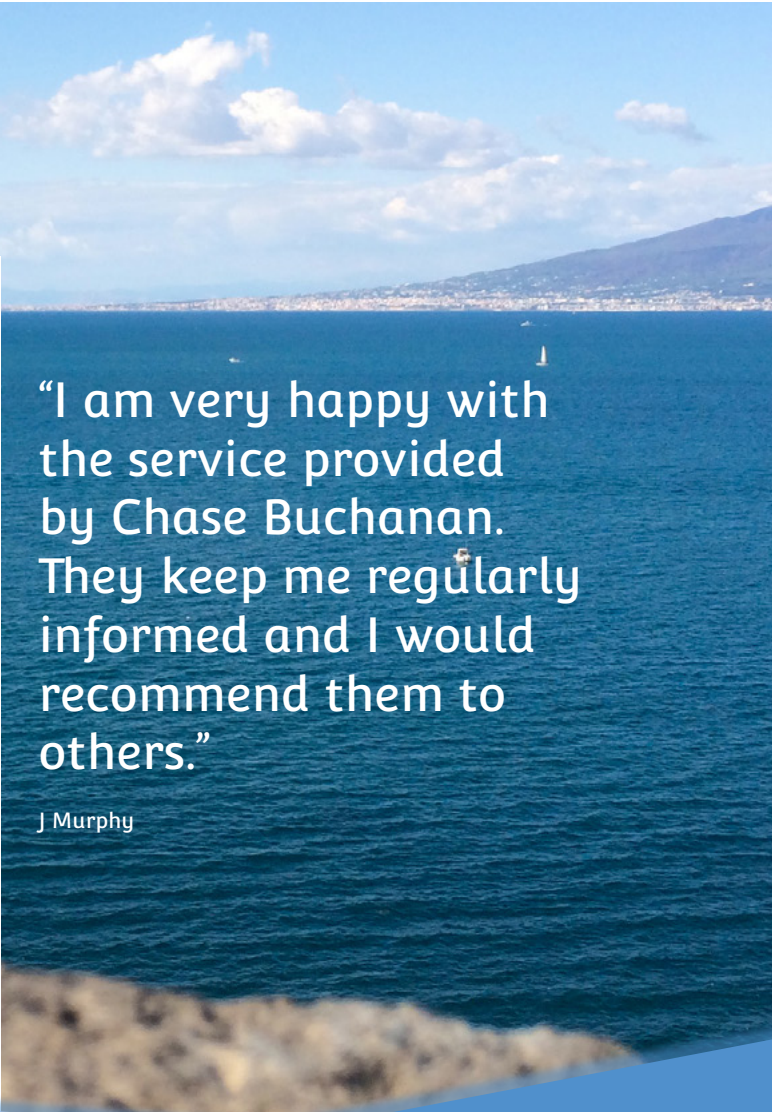
S Robertson.

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

Tatiana Bateson
Private Wealth Manager
chasebuchanan.com

Tatiana 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.

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

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Trusted advice made simple

TALK WITH TATIANA

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