

INTRODUCING

Mark Kinally



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Mark has worked in financial services for almost 20 years, gaining experience with some of the best-known names in wealth management, including St. James's Place, Royal Bank of Canada, Merrill Lynch and Barclays Wealth International.

During this time, he has supported clients ranging from professionals and families to high-net-worth individuals across the UK, Europe, Africa and the Middle East. Mark focuses on building long-term relationships and creating financial strategies that are clear, practical and tailored to each client's personal goals.

His areas of expertise include investments, pensions, retirement planning, estate and tax planning, as well as supporting clients with the challenges and opportunities of cross-border living. Mark is qualified to Diploma level in Financial Planning and holds further certifications in investment advice and mortgage planning.

After travelling to the Algarve for the last 35 years, Mark originally from Hampshire in the UK he relocated to the Algarve with his wife Alice, who works in the travel industry, and their two sons. Together they enjoy the opportunities that come with living abroad, especially the outdoors lifestyle. Mark can often be found enjoying sunrises and sunsets on the beach, swimming in the ocean, playing golf or padel, keeping active at the gym, and exploring the region's food and culture.

WHAT OUR CLIENTS HAVE TO SAY

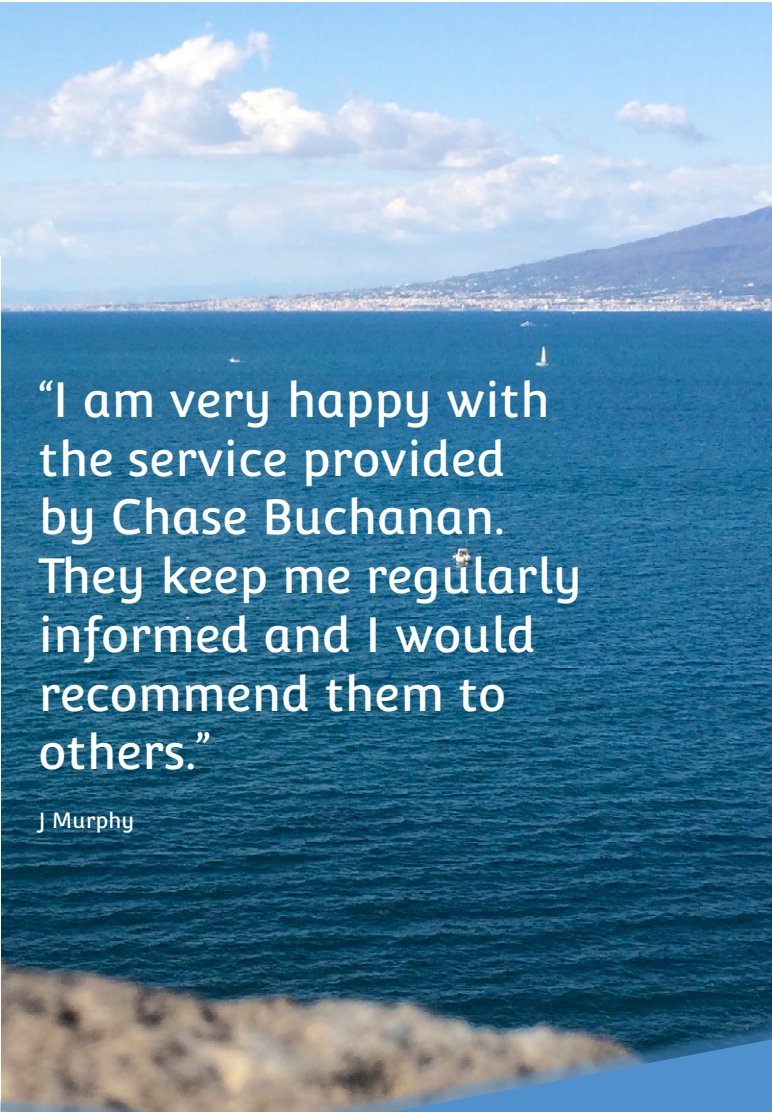
S Robertson.

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

Mark Kinally
Private Wealth Manager
chasebuchanan.com

Mark 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.

Mark 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 MARK

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