

A portrait of Steve Thompson, a man with short brown hair and a light beard, smiling. He is wearing a dark grey suit jacket, a light blue striped shirt, and a pink tie with dark polka dots. The background is a solid dark blue.

INTRODUCING

Steve Thompson

Chartered FCSI, ALIBF, DipPFS,  
CertPFS (DM&Securities), EFA

Chase Buchanan

PRIVATE WEALTH MANAGEMENT

For those looking to protect and grow their wealth with confidence, Steve brings three decades of trusted financial expertise. His focus is on delivering clear, strategic advice that helps clients enjoy life today while planning securely for tomorrow.

Steve brings more than thirty years of experience in financial services, building a reputation for integrity, clarity, and trusted cross-border advice. His career began in the UK in 1991, progressing through senior advisory positions with leading wealth management firms before expanding internationally to the Middle East, Africa, and Europe. Today, as a Private Wealth Manager with Chase Buchanan in the Algarve, Steve focuses on helping UK expatriates navigate complex tax and wealth considerations with confidence.

Holding advanced CISI qualifications and extensive expertise in discretionary fund management and securities, Steve combines rigorous technical knowledge with a calm, measured approach that instills trust. He understands that long-term success in wealth planning depends on clear strategies, sound judgement, and enduring client relationships.

Having lived overseas himself, Steve appreciates both the opportunities and the challenges of expatriate life. Away from his professional commitments, he enjoys golf, kayaking, and exploring the Algarve coastline with his wife Heather, sharing a passion for wellbeing and the active lifestyle Portugal offers.

## WHAT OUR CLIENTS HAVE TO SAY

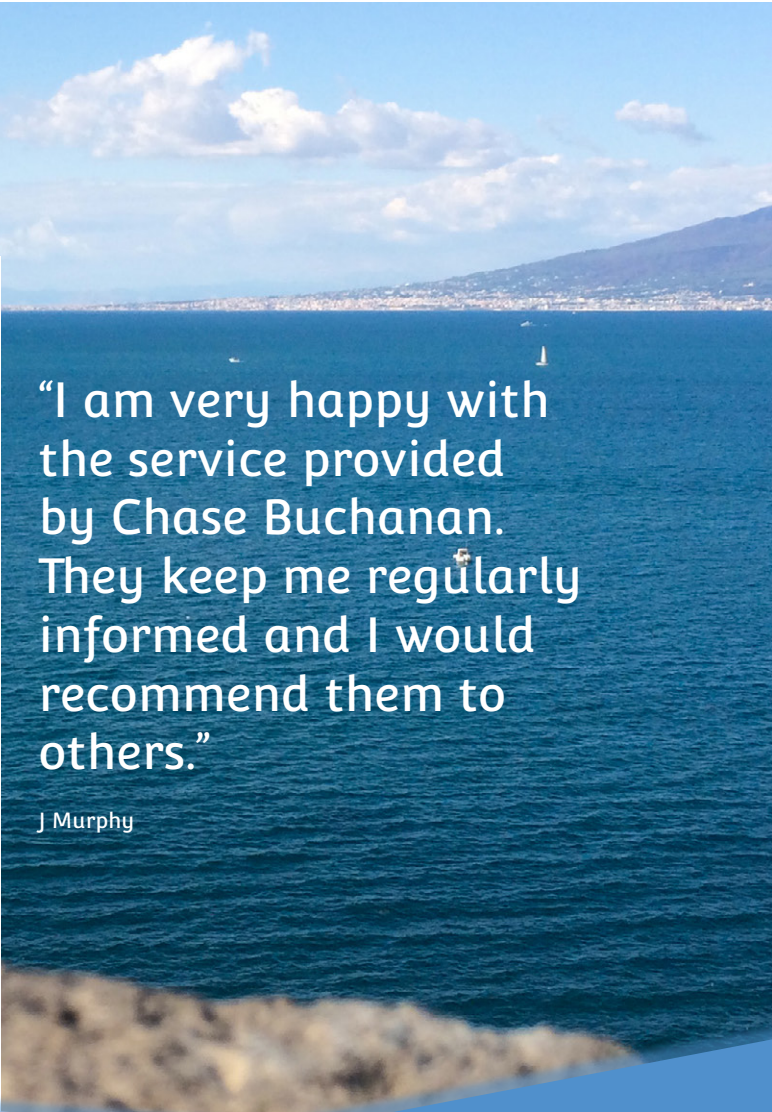
### S Robertson.

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

Steve Thompson  
Private Wealth Manager  
[chasebuchanan.com](http://chasebuchanan.com)

Steve is qualified to advise in all facets of personal financial planning including:

Retirement and income planning

Inheritance tax and estate planning

Cross-border tax planning

Lump sum and investment planning

Critical illness and family protection

UK Pensions (SIPPs, QROPS, QNUPS)

## 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.

Steve 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 STEVE

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