

A portrait of Stephen Lewis, a middle-aged man with short, graying hair, wearing a dark pinstripe suit, a white shirt, and a striped tie. He is looking directly at the camera with a slight smile. The background is a solid dark blue.

INTRODUCING
Stephen Lewis

Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Stephen's career in the financial services industry started in Glasgow, Scotland in a snowy January 1987. A year later, he and a business partner started their own firm...

With the advent of Financial Services legislation coming into effect Stephen decided to join Abbey Life who at that time were one of the UK's largest life insurance companies.

Having enjoyed five successful years with Abbey Life the opportunity arose to relocate overseas and in April 1995 Stephen moved to Doha, Qatar. Two years later Stephen and a close friend started Integra Financial Management but due to their concerns over licencing and regulation, they restructured at the beginning of 2003 and became IFM Integra Investments Ltd., licenced with the Central Bank of Cyprus.

His 25 successful years in the Middle East ended with changes to the global financial services regulations. These changes which were very positive for clients, investors and advisers alike led Stephen to join Chase Buchanan in 2020 and benefit from their highly managed structure and regulatory control.

Stephen and his partner Catherine now live in the warm climate of Portugal. He has two sons he hopes will follow him into financial services – Jordan, 23 and Max, 20 who both live in Essex, UK.

From snowy Glasgow, 33 years' experience, to the warmth of Portugal, Stephen is happy to have joined the Chase Buchanan team.

WHAT STEPHEN'S CLIENTS HAVE TO SAY

Alistair Law

Business Owner, Dubai UAE.

I've have known Stephen since 2010. Stephen has been incredible and has helped me unravel some really bad advice from some really poor advisors. Stephens focus on our families need has been fantastic, he's arranged life insurance, critical illness cover and investments. His focus on always trying to reduce unnecessary cost is both refreshing and unusual in the Middle East. I have no hesitation in recommending Stephen as a wonderfully professional financial manager.

Alan Jones

Chartered Accountant

I have known Stephen Lewis for over twenty years. Over this period, he has assisted me with financial advice in respect of long term investment saving and life insurance. I have found him to be knowledgeable, trustworthy and genuinely interested in the best outcomes for his clients. He regularly kept in contact over the years through email and face to face meetings providing financial reviews and other relevant updates. I have recommended Steve to friends and colleagues and I have only ever received positive feedback.

Tewfik Al Far

Retired Senior Operations Advisor, Qatar Petroleum

I have known and worked with Stephen Lewis for the last twenty years. Steve successfully managed my personal pension as well as children's education plans to maturity from 1998–2018. I am very happy with the outcome of my investment. His integrity and communication struck me as his strong points throughout the many meeting and emails we have exchanged. I find his character very friendly and helpful. I look forward to continuing with Stephen in the future hoping for a mutually fruitful outcome again.

Guy

Financial Management Consultant

I met Steve over 25 years ago in a professional industry capacity. He is one of the most genuine, knowledgeable, and trustworthy financial advisors I have ever had the pleasure of dealing with. Steve remains a close contact all these years later and I would have no hesitation in recommending his services to anyone.

Stephen Lewis
Private Wealth Manager
chasebuchanan.com

Stephen 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.

Stephen 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 STEPHEN

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