

INTRODUCING

Ian Leigh DipFA



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Ian Leigh
Private Wealth Manager
chasebuchanan.com

Ian begin his career
in banking where he
worked for Lloyds
Bank for nine years
before becoming
a UK qualified
Financial Consultant
with Britannic
Assurance.

Ian subsequently worked for other major life assurance companies, including the Wesleyan and Sun Life Financial of Canada, before setting up his own business as an Independent Financial Adviser.

Ian's international career began in Italy with a senior position, managing a team of financial consultants based in Rome, whilst advising expats and international professionals in the region. He then decided to further his experience as an International Pension Specialist, offering pension transfer advice to primarily British expats in various locations around the world, including Canada. Ian recently opened a new branch office in Loule (The Algarve), Portugal and brings with him a wealth of experience working with expats of all nationalities, helping them to structure their lives in the most tax-efficient way, whilst complying with local regulations.

A fully qualified and highly experienced professional, with over 25 years' experience delivering excellent service to many clients, Ian is also very much a family man, engaged to his long-term partner Keyomi and has four children and three dogs. With quite a large family, he recognises the need to plan properly for the future and he enjoys sharing his expertise to help his clients achieve their objectives.

WHAT IAN'S CLIENTS HAVE TO SAY

Mark Waterworth

Senior Structural Engineer at AECOM

Ian has assisted me in the transfer of my accrued pension fund from a local government pension scheme administered by Lancashire County Council to an accessible overseas pension fund managed originally by Holborn Assets now by Chase Buchanan. I now live in Canada and I have benefited from Ian's easy-going approach and vast knowledge on finance, investment and overseas pension expertise. I highly recommend Ian.

Alan Milne

HSSEQ Field Advisor/Training & Competency Specialist at ASCO Canada

Ian has been guiding me through the process of consolidating and investing pension funds I had accrued in the UK before moving to Canada. At each step he has been very supportive and has provided very clear guidance. Given the current times it has been very reassuring for me to have Ian looking after my investments. I would highly recommend entrusting Ian with your wealth management needs.

"Ian has proved to be a very involved, open and friendly Client Adviser and for which, I am very grateful. Having confidence that one's fund will be professionally invested and managed is vital. It is here where, I believe, having a Client Adviser like Ian is particularly reassuring."

Peter Kidman
Retired

Jim Hogg

Real Estate Agent at Remax

I would highly recommend Ian – both as a professional business manager and as a good person. Ian has sorted out our somewhat complicated pension issues and has communicated extremely well any problems and the solutions in a timely manner. Ian is able to steer people towards sensible solutions which is an attribute not always available in this world. I wish Ian every success as a Private Wealth Manager.

Kenneth Valentine

Laboratory Engineer at Saint-Gobain Abrasives

Ian continues to be highly proactive, engaging and efficient in his very professional role as my Private Client Manager from Chase Buchanan. The services he provides gives a thorough and in-depth piece of mind analysis concerning the financial background within a personal portfolio. I have no hesitation in recommending Ian with his abilities and skills.

Dave & Janet Birchenough

Retired

We first contacted Ian Leigh around a year ago regarding our UK pensions. As we had been living overseas for quite some time we were a little behind times and needed help and advice on our future incomes. Ian took the trouble to spend many hours with us at home giving advise on how we could reinvest our pensions. We then had numerous questions as we did not fully understand all the options but he was able to answer professionally with patience and understanding. This then lead to Chase Buchanan moving funds from several companies into SIPPS for us. During this time Ian called us regularly to update us on the process of the transfers. We are very happy with the service from him and have recommended him to several of our friends.

Ian Leigh
Private Wealth Manager
chasebuchanan.com

Ian 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.

Ian 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:

M UK: +44 7492 772 370

M Portugal: +351 934 417 821

Trusted advice made simple

TALK WITH IAN

M UK: +44 7492 772 370

M Portugal: +351 934 417 821

E: ian.leigh@chasebuchanan.com

Ian Leigh DipFA
Branch Manager – Portugal
Urbanização Boa Entrada
Lote 73
8100-724 Loulé
Portugal
T: +351 308 802 691

www.chasebuchanan.com