

## INTRODUCING

### Andrew Lumley-Holmes

Andrew is one of the Directors of Chase Buchanan. Residing in Cyprus where our head office is located, he holds key regulatory positions in the business helping our staff to deliver Chase Buchanan's service to its clients along with continuing to manage and advise his clients in many different countries and continents around the world.



With 18 years' experience in the financial world, Andrew brings a wealth of knowledge and experience to his clients to assist them with a wide range of personal financial solutions. After 6 years UK experience as a trader at Bank of America and in discretionary portfolio management with HSBC he became an expat himself and moved into the international market in 2008 where he has since worked for banks and private wealth firms in Hong Kong, Moscow and Cyprus while maintaining a global client bank.

As a director of the firm, Andrew holds himself and all our staff to high standards – his specialities are investments, portfolio management and financial planning with significant UK pension transfer experience. He holds the advanced (level 4) UK financial planning exams along with advanced pensions, stockbroking and discretionary investment management qualifications. He also holds the Cysec advanced exam as well as securities and advisory qualifications from Hong Kong and the USA.

## WHAT ANDREW'S CLIENTS HAVE TO SAY

### Mr D. Cohen

Andrew walked me through the options available with regard to UK pension transfers, in detail and with transparency from start to finish. Very nice to deal with and always available for discussion.

### Mr D. O'Connell

Andrew has provided excellent guidance in regards to pension funds. He does so in a straight forward but informative manner ensuring one has transparency to risk/benefits of investment possibilities. Displays calm reassurance during periods of financial volatility. A highly professional advisor.

### Mr P. Baker

Andrew Lumley-Holmes has been my IFA for the past five years while I have been working as an expat. He has provided me with sound advice on where best to invest my savings in order to maximise earnings while managing risk, also resolving issues with fund managers due to my frequent changes of address. He has kept me abreast of potential fluctuations in the market with bi-annual updates and has recommended adjustments in my portfolio as appropriate. I have no hesitation in recommending Andrew as an independent financial advisor.

### Mr N. Hillman

I would like to take this opportunity to recommend the services of Andrew for those who might be interested in seeking financial advice and investment opportunities. Andrew is a confident individual, he is very knowledgeable about markets and how to build a good portfolio to meet an investors needs. Andrew generally speaks with a client twice a year to keep in touch and update the client on any developments regarding their investment. He is always available to be contacted by email and is very quick to respond. He is also able to arrange telephone or video calls whenever a client requests. Regardless of an individuals investment history, I believe it would be beneficial to speak with Andrew regarding any future investment advice and to see if he and his team can better support your financial requirements.

### Mr N. Long

Andrew's expert advice and comprehensive understanding of the UK pensions market enabled me to take sound financial decisions with my pension portfolio. I really appreciated his tenacity and professionalism in helping to navigate me through the process leading to a successful outcome. Thanks Andrew!

# Trusted advice made simple

Andrew 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

Andrew 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.

## 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.

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