

INTRODUCING

John Martins APP ACSI



Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Born and raised in
the Algarve,
John graduated
from Algarve
University with
a B.Sc. degree
in Business
Management and
a Post-Graduate
degree in Finance.

Prior to joining Chase Buchanan's UK office as a Private Wealth Manager, he was a Wealth Manager and Investment Committee member at a Gibraltar-Portugal Wealth Management firm for 2.5 years and spent 3 years as an International Financial Advisor in the Algarve before that. John also obtained relevant experience in Corporate Finance and Equity Research from his Analyst roles at Investment Banking boutiques in London.

John is extremely passionate about financial planning and strongly believes that ethics and cost transparency, coupled with financial advice based on academic research, is the best way to achieve long term client satisfaction. As a member of the Portuguese Order of Economists, John has spoken at several investment conferences, and often writes articles on various topics, ranging from the state of global financial markets, the Algarve real estate market and the Algarve/Portuguese economy.

John holds several relevant professional qualifications in financial services, among them:

- ACSI – Associated Member of the Chartered Institute for Securities & Investment
- Level 4 Certificate in Paraplanning with the Chartered Institute for Securities & Investment
- Level 4 Investment Advice Diploma with the Chartered Institute for Securities & Investment
- Capital Markets & Securities Analyst with the Corporate Finance Institute
- Financial Planning & Wealth Management with the Corporate Finance Institute
- Investment Foundations Certificate with the CFA Institute

WHAT OUR CLIENTS HAVE TO SAY

V Jones

It's been my pleasure to have known John.

He is personable, never fails to hear me, out a great listener but also assists me to get matters in the right perspective

I've observed his career development with interest and my confidence in his advice has progressively grown over this time.

Whilst my financial resources are relatively modest and I think fair to say somewhat complicated, with family business demands and an un-related start-up I frequently seek John's advice.

Joining Chase Buchanan with its significant and wide ranging resources, with my account serviced by John I believe I'm in very good hands to ensure the best financial planning possible.



John Martins
Private Wealth Manager
chasebuchanan.com

John 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.

John 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 JOHN

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