

A professional headshot of Paul Herd, a middle-aged man with short, light brown hair, wearing a dark pinstriped suit jacket, a white dress shirt, and a blue patterned tie. He is looking directly at the camera with a neutral expression. The background is a solid dark blue. The image is partially obscured by a diagonal white and light blue graphic element at the bottom.

INTRODUCING

Paul Herd APFS

Chase Buchanan

PRIVATE WEALTH MANAGEMENT

## Paul Herd

Chartered Financial Planner, Private Wealth Manager

[chasebuchanan.com](http://chasebuchanan.com)

Paul specialises  
in investment and  
retirement planning  
since achieving the 'Gold  
Standard' Chartered  
Financial Planner  
qualification in 2012.

Paul's been in the financial services Industry for over 35 years and during that time has been involved in many aspects of planning and advising personal and corporate clients. He is a former pension transfer specialist with a focus on Defined Benefit Pensions.

Within his career Paul has been an independent adviser in the UK and helped many clients achieve their investment and retirement goals with his plain English, jargon free approach. Having recently moved to Portugal himself, Paul is very aware of the various aspects that need consideration when assisting others moving to the area, both financially and logistically.

Outside of work Paul is a keen golfer, and also enjoys surfing. He is a very lucky husband to Debbe, and proud father to his four daughters.

## 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

**Paul Herd**  
Chartered Financial Planner, Private Wealth Manager  
chasebuchanan.com

Paul 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.

Paul 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 PAUL

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