



INTRODUCING
Sean Lee

Chase Buchanan

PRIVATE WEALTH MANAGEMENT

Sean Lee
Private Wealth Manager
chasebuchanan.com

Sean holds the
UK Advanced Level 4
Diploma in Financial
Advice qualification,
giving the peace of
mind that his wealth of
experience is backed
by a solid knowledge
foundation.

Sean has over 20 years' experience in Financial Services. He started his financial services career with Prudential in 1999 as a Financial Consultant. Later, he progressed to his own practice as an Independent Financial Adviser. As an IFA he has always been resolute in providing holistic, unbiased, impartial financial advice – always in the best interest of his clients.

Having recently moved to the Algarve, a place he had frequented for many years previously, Sean is extending his wealth management advice to private clients in Portugal. He helps his clients to structure, simplify and manage their broader assets, investments and pensions in a tax efficient manner.

Sean has two sons and is married to Tina, who he proposed to in the Algarve some years ago.

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

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Sean 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.

Sean 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:

Mobile: +44 (0) 7939 227 316

Office: +351 308 802 691

Trusted advice made simple

TALK WITH SEAN

Mobile: +44 (0) 7939 227 316
Office: +351 308 802 691

E: sean.lee@chasebuchanan.com

Sean Lee
Urbanização Boa Entrada
Lote 73
8100-724 Loulé
Portugal

www.chasebuchanan.com