

Chase Wealth Solutions



10 -12 Prosepct Hill
IM1 1EJ
Isle of Man

Phone: 630450

At Chase Wealth we:

1. Are tied to no company or group of companies so we can give truly independent advice and thereby provide a better outcome for you
2. Understand everyone is an individual so we provide highly tailored solutions to meet your needs
3. Bring together the experience of specialists in Investments, Pensions, Protection and Mortgages to provide a holistic financial solution for you
4. Act ethically, always give honest answers, provide clear charging and excellent service throughout the advice process

Typically our clients are looking to invest over £20,000 at any one time or they hold investment portfolios over £100,000 in value. The majority of our clients are looking for: Investment and Pension Plans We provide a wide selection of solutions designed to meet your needs: The period of time you wish to hold the investment for Your need for income and access to your

moneyWhether you want safe (generally lower-return) investments or more volatile (generally higher-return) investmentsWhilst others are looking for:Lifestyle Cash Flow PlanningUsing a sophisticated financial model we look to forecast your financial future. This can provide you with confidence for the future, answering such questions as when you can retire, what will be your income, do you need to save more (or can you save less?).When you choose Chase Wealth as your adviser then you can be sure that you will obtain advice which is suitable for you both at the outset and throughout your life.

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