



ALAN COPLEY

Managing Director Austen
Morris Associates Europe

*"The measure of who we are is
what we do with what we have"*

- Vince Lombardi

PROFESSIONAL ACHIEVEMENTS

- | Cyprus Securities & Exchange Commission ('CYSEC')
- | MIFID II Advanced Certificate in Financial Planning
- | CII (Chartered Insurance Institute)
- | Financial Advisers International Qualification
- | Recognized Top Consultant 7 years in a row 2012 – 2019 with two different financial firms

PERSONAL ACHIEVEMENTS

- | Situational Leadership Sales Trainer and Development Coach (Blanchard school of Salesmanship)
- | Set up and managed a Europe-wide International Distribution Network for an Australian Venture Capital Group
- | Top Consultant and Manager with 3 different Consultancy firms
- | Fluent in German

With over two decades of experience in international financial services, Alan has built up a global client base. He has advised many international clients on all aspects of their financial wellbeing. Since 2010, he has specialized in advice on UK Pensions. Alan is responsible for the establishment of AMA's newest company, 'Austen Morris Associates Europe' (AMAE) based in the European financial hub of Frankfurt, Germany. As MD of AMAE he is now recruiting and building a team of qualified consultants in key locations across the European Union.

Alan has held multiple managerial and consulting roles during his career with various international companies based in Europe, the US and Australia. A seasoned professional who always puts his client's needs first.

AREAS OF SPECIALIST FOCUS

- | Sophisticated solutions for professional investors
- | Executive and Board level investment structuring
- | Global Portfolio Structuring and Management
- | Discretionary Trust Setup and Management
- | Offshore company structuring - GIB | MAU | Malta | Other

PRIVATE WEALTH MANAGEMENT

- | Retirement Modelling & Planning
- | Estate Planning & Fiduciary Review
- | Quantitative Portfolio & Fund Analytics
- | International Tertiary Education Planning
- | Direct International Property Investments
- | UK & US Pension Planning & Transfers
- | Portfolio Gearing & Sophisticated Investments
- | Mutual Funds & Exchange Traded Funds
- | Direct Share Investments
- | Investment Bank Products
- | Employee Benefit Schemes
- | Business Assurance
- | Health Care