



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 more than two decades of experience in international financial services, Alan Copley has built and advised a diverse global client base, supporting individuals across every stage of their financial journey. Since 2010, he has specialised in UK pension planning, providing clear, strategic guidance to expatriates and internationally mobile clients navigating complex cross-border considerations.

Alan was instrumental in establishing Austen Morris Associates Europe (AMAE), the group’s European arm, headquartered in Frankfurt, one of Europe’s leading financial hubs. As Managing Director of AMAE, he is responsible for shaping the firm’s European strategy, recruiting and developing high-calibre consultants, and expanding the group’s footprint across key European Union jurisdictions.

Throughout his career, Alan has held senior managerial and consulting roles with international firms operating across Europe, the United States, and Australia. His breadth of experience, combined with a disciplined, client-first philosophy, has earned him a reputation as a trusted adviser known for clarity, integrity, and long-term value creation. Alan is the Managing Director of Austen Morris Associates Europe and continues to advise clients directly, ensuring that strategic leadership remains grounded in practical, outcomes-focused financial advice.

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

ALAN COPLEY

Managing Director Austen Morris Associates Europe

REFERENCES AND TESTIMONIALS

"I have had the good fortune to benefit from Alan Copley's financial wisdom for the last seven years. Alan continues to guide me on a journey of pension investment following my decision to become a UK Expatriate. Without doubt, his skillful advice helped me make the best decisions that have proved to be extremely effective for my future. Alan is exceptionally easy to work with, has exercised great patience to fully explain options and requirements, and is now a most trusted first and only 'go-to' expert in his field. I would not hesitate to strongly recommend Alan to anybody taking steps to financially enhance their future through investments."

Peter J. Cole - Client

"Alan has been my financial advisor for the last seven years. He worked with me and established a great selection of financial products which was funded by conversion of my UK pension to a QROPS. The fund has performed well and provided me with income while I maintain the capital value during some very challenging times. Alan's knowledge of financial instruments and his access to them allows him to make suggestions for investments that I personally would never have thought to use. Alan is always available when I need to discuss my fund and provides an efficient professional service."

Simon Silverleaf - Client

"We have worked with Alan since 2015, when we began moving our pensions out of the UK. Alan provided excellent guidance and support throughout that process, making the paperwork as seamless as possible. Since then, he has provided excellent guidance on managing our investments, and we have been extremely pleased with his advice and timely communication. We always enjoy our catch-ups and time with Alan and highly recommend his services."

Craig and Caron Elston – Clients