FINANCIAL PLANNING FOR YOUR FUTURE

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invest in your future...

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Our comprehensive financial planning process takes into account all aspects of your life including looking at your current financial position, along with helping you to set short, medium and long term financial goals.

Once we have spent some time discussing the plans for your future, we then proceed to designing a plan and investment strategy to meet these goals.

Summary Process

We split our financial planning process into 6 steps, all tailored to suit your own exact requirements.

The process is completely focused on the needs of you and your family, your business and career and your future goals.

We work on a fee-only basis. What this really means is that we have no conflicts of interest. We don't earn commissions on the sale of financial products and we guarantee to put your best interests ahead of our own. We invest client funds in the best value contracts available. (You get the same pricing we would get ourselves!).

Initially we focus on your overall financial position and try to really understand what you want to achieve both personally and financially. Once we understand this, we will then be in a position to make recommendations on the best course of action.

We then help you implement the various recommendations in a cost effective manner. We hope to remain by your side offering advice and support long term, to help you achieve your dreams.

Our fee for implementation of a Financial Plan is €2,950 (+Vat). This covers the establishment and implementation of a comprehensive financial plan and first year of support. This applies with no limit on hours or support given and is payable in advance.

Ongoing annual support fees depend on the complexity of your financial plan, and the level of assets being managed. We promise there will be no nasty surprises, and all ongoing fees will be agreed with you in advance.

Our 6 Step Process

1

Building a picture
In our first consultation we try to get under the bonnet and understand what makes you tick. We ask a lot of questions in order to better understand your past financial decisions, current financial position and goals for the future.

2

Research
We spend some time researching any current financial products you have to ascertain their appropriateness and value. We also research the market for the best products to use in the future.

3

Modelling
We use bespoke software to model your future plans. This will include plans for your family, career, investments and lifestyle. We will always keep a close eye on taxation throughout this part of the planning process. (Samples of these can be viewed on p4)

4

Review Meeting
We discuss our findings, while interactively using our cash flow modelling software on big screens in the office. This will allow us to refine our recommendations.

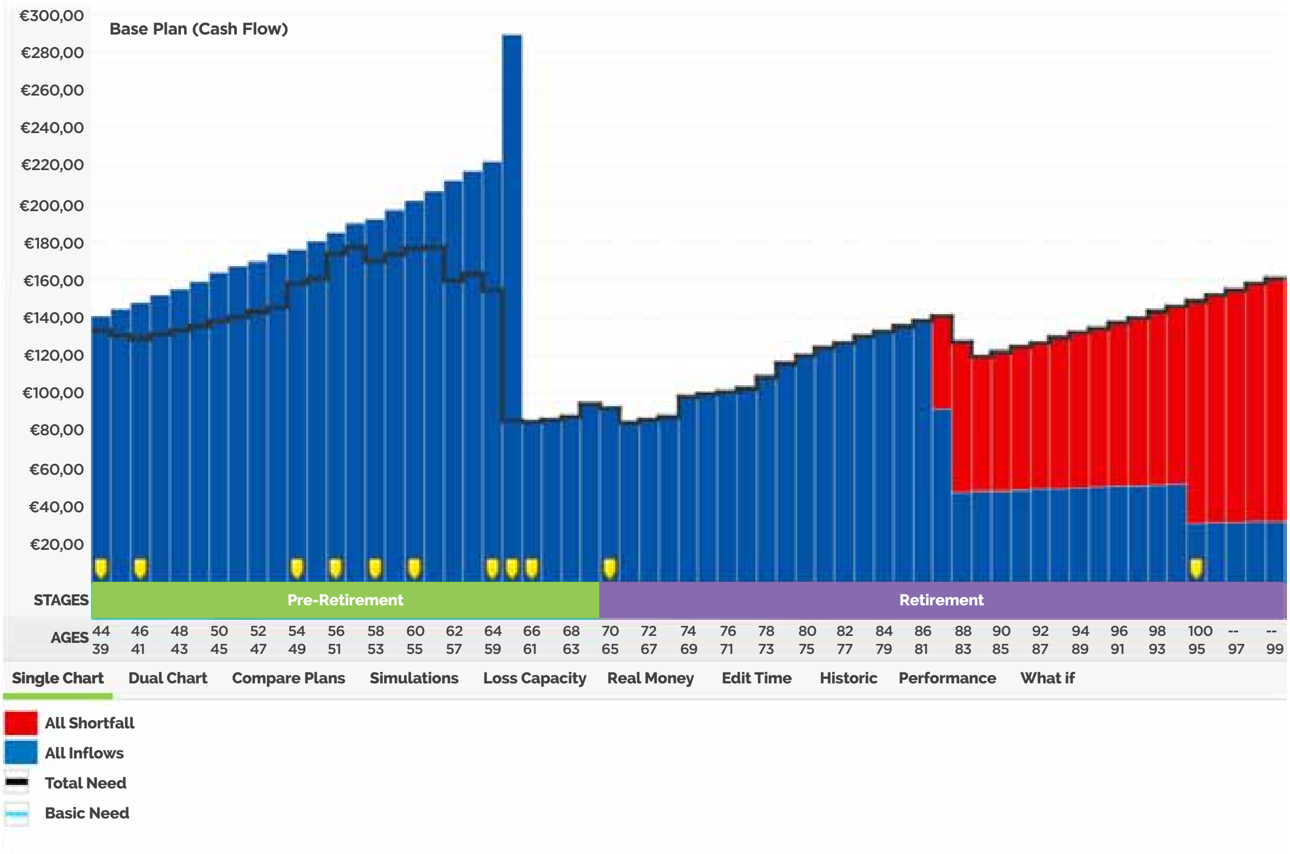
5

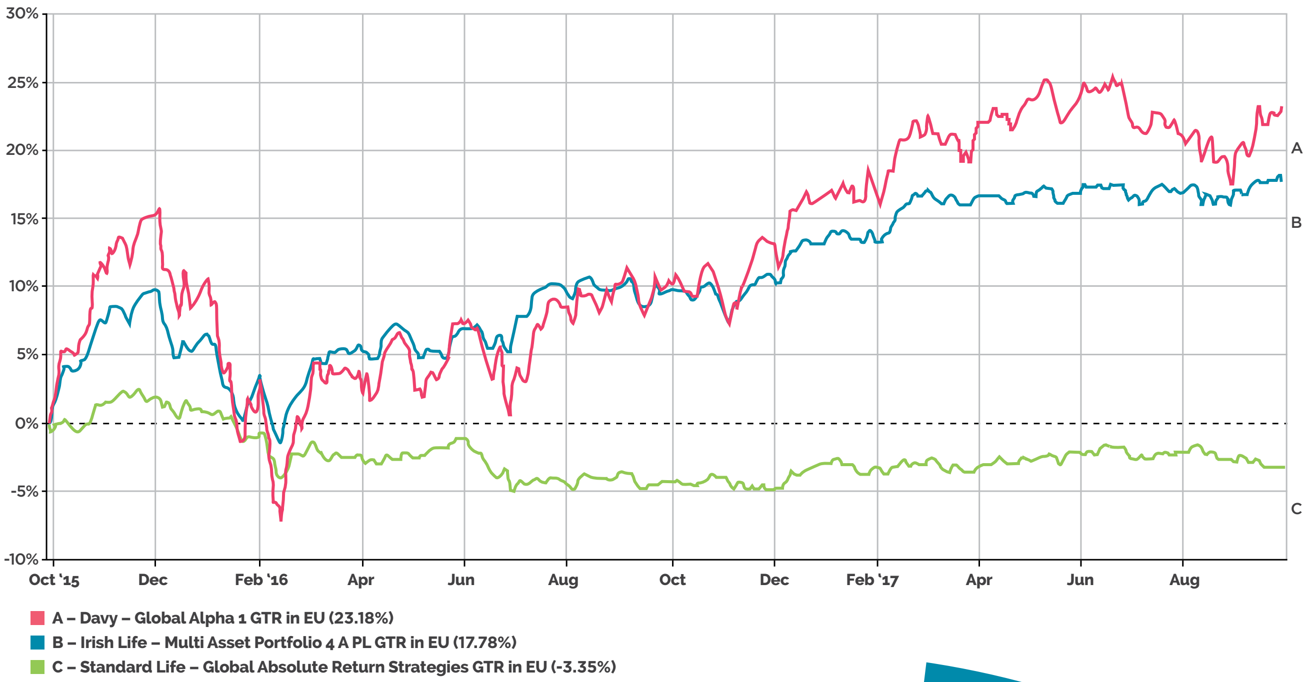
Reporting
We then compile all the findings from our research and meetings into one single comprehensive report which will form the basis of future financial plans.

6

Following through:
We will work closely with you to implement your financial plan, replacing any old financial products that may not be appropriate, putting in place new product (on a nil commission basis), and then reviewing progress of your plan over the first 12 months.

Sample Modelling Charts





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