

A scenic coastal road with a vintage Volkswagen van driving along the shore, with mountains in the background.

Lifetime financial planning

Trusted guidance tailored to your unique family circumstances and goals, continuously refined for you





"We're here to help you create a more secure financial future for yourself and your family."

We'll design and manage your financial plan and investment strategy to continuously meet your needs as your circumstances change over time."

Cullen, Sinead
Head of Wealth & Financial Planning

The financial stages of life

Building
Wealth

Accumulation

Through meticulous cashflow analysis, our financial planners collaborate with you to chart a course for your financial future. Should unexpected events occur, we ensure you're well-protected, so you can still attain your chosen financial goals for you and your family.

Growth and safeguarding

These peak earnings years are a good opportunity to enjoy your hard-earned money and maximise your savings and investments. We'll explore investment opportunities and tax-efficient structures that align with your financial objectives.

Retirement and
Succession Planning

Preservation and reward

Our retirement team can help you craft a personalised retirement plan tailored to your lifestyle and objectives, ensuring tax-efficient retirement savings. We'll harmonise all your financial aspirations incorporating your immediate expenses, investment potential, and a strategic approach to reduced work commitments.



What can you expect?

There's a lot to think about when developing and implementing your financial plan and bespoke investment strategy. We've put together everything that's involved into these five stages:

1. Understand

We'll start with a conversation, which will give us the opportunity to find out about your situation and what you'd like to achieve.

We take this time to get to know you, your aspirations and long-term goals.

2. Define

Understanding your financial goals and attitude towards risk will help us create your financial plan and design a bespoke plan that meets your financial needs.

We'll discuss your investment preferences and timescales so we can understand precisely what it is you want to achieve.

3. Design

Your plan will cover everything that matters to you – from making the most of your tax allowances, exemptions and reliefs to effective retirement planning.

We can also explore protection policies, so you have peace of mind about your family's financial future.

4. Implement

Once we've agreed with you on how we aim to reach your financial goals, we'll implement your plan.

Through ongoing monitoring and adjustments, we'll make sure your plan adapts to your changing situation and is always in line with the investment remit you've given us.

5. Review

Your dedicated Financial Planner will oversee your plan and investments.

We're here at any time to discuss any questions you have about your financial plan and portfolio.

Contact us today for a tailored plan and a brighter tomorrow

 www.nfpireland.ie/wealth

 wealth@nfpireland.ie

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NFP can help you with:

- ✓ In-depth financial planning analysis
- ✓ Portfolio construction
- ✓ Portfolio monitoring and management
- ✓ Pension management
- ✓ Comprehensive protection review and implementation
- ✓ Cash extraction plans for business owners
- ✓ Business protection
- ✓ Personalised retirement lifestyle planning
- ✓ Estate and inheritance planning



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