

Earley Consulting for Business Owners

At Earley Consulting, we understand the financial challenges faced by business owners today. We understand how closely intertwined your personal and business lives are, so we will help you to develop a financial strategy that incorporates every aspect of your life.

We understand the risks that you may have taken in building up your business, borrowing money and working long hours to build a successful enterprise. Now your sights are turning to improving profitability and exiting effectively, and maximising your financial outcomes with enough money to fund a great retirement or semi-retirement.

The Earley Consulting team help you address the financial challenges across a wide range of areas.

Where we help you



FINANCIAL SECURITY FOR YOUR BUSINESS & FAMILY

We implement solutions that financially protect your family and business partners against death or serious illness.



INVESTMENT AND CASHFLOW MANAGEMENT

We guide you in utilising the cash built up in your business to create diversified asset pools. We help you to maximise the financial assets built up in your business. We assist you in building personal funds to provide for your children's education, a specific project or a rainy day fund.



BUSINESS EXIT & RETIREMENT PLANNING

We work with you at examining all succession planning and sale options. We guide you to ensure you extract the maximum value at business exit through retirement planning and tax based opportunities.



AT RETIREMENT PLANNING

We support you in planning a tax efficient retirement income. We develop a plan for you to draw down your pension fund assets in the most tax efficient way.



POST RETIREMENT SUPPORT

We support you in managing your money in retirement. We help you to identify your required drawdown levels, while ensuring this post retirement income is taken in the most tax efficient way possible.



TRANSFERRING YOUR WEALTH

We assist you with estate planning, and help you transfer your wealth as you choose, while minimising the impact of tax on the transfer of your assets.

Live the lifestyle you want to live

What you can expect

REGULAR REVIEWS

- We help you to identify your financial goals at the outset, and will build a strategy to help you achieve them
 - We then want to meet with you regularly to ensure your plan stays on track. We agree how often you would like to meet us, and schedule these meeting dates.
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FINANCIAL PLANNER ACCESS

- We understand that your circumstances can often change in both your personal and business lives
 - You have access to a professional financial planner to help clarify any impacts these changes may have on your financial strategy, and to deal with them accordingly.
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FAMILY FINANCIAL PLANNING

- We understand how closely linked your business and personal lives are
 - We take a holistic view of your finances, ensuring that any solutions recommended make sense across all aspects of your life. This applies to financially protecting your family and business, growing your business and your wealth, and transferring money effectively from your business to you and your family at retirement and beyond.
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WORKING WITH OTHER ADVISERS

- We recognise the importance of your other trusted adviser relationships, whether it be your accountant, solicitor or tax consultant
 - We have a great deal of experience working collaboratively with other advisers to ensure the very best results for you.
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www.earleyconsulting.ie