Earley Consulting for Individual Investors

Investors face a myriad of challenges today in maximising their financial assets. At Earley Consulting, we always start with the question – what do you want your money to do for you? Once we understand your expectations, we can then start working on an appropriate financial plan for you.

Your financial plan is the foundation for your investment strategy. This will help you address the big questions;

- ***How much money do you need to live the lifestyle you want to lead?***
- ***When can you retire?***
- ***How can you get your money working as hard as possible for you?***
- ***Do your investment and retirement portfolios reflect your attitude to risk?***
- ***What if an unexpected event such as a death or serious illness happens along the way?***
- ***How can you transfer your wealth to your family in the most tax efficient and equitable way?***

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

Where we help you

INVESTMENT MANAGEMENT	Whether your goals are to provide funds for your children's education, a specific project, or a rainy day fund, we guide you in maximising your financial assets.
RETIREMENT PLANNING	We guide you to ensure you maximise your financial outcome at retirement, through careful retirement planning and other tax based opportunities.
FINANCIAL SECURITY FOR YOUR FAMILY	We implement solutions that financially protect you and your family against death or serious illness.
AT RETIREMENT PLANNING	We support you in planning a tax efficient retirement income. We also 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.

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Live the lifestyle you want to live

What you can expect

A STRATEGIC APPROACH

- We assist you in developing your investment strategy, utilising the proven principles of strategic asset allocation for portfolios and long-term investment horizons
- We guide you in identifying the optimal asset allocation for you
- We advise you in relation to tactical investment decisions, as changing investment conditions might demand.

REGULAR REVIEWS

- We help you to identify your financial goals at the outset, and build a strategy to help you achieve them
- We want to meet with you regularly to ensure your plan stays on track
- You can decide how often you would like to meet us, and we schedule these meeting dates.

FINANCIAL PLANNER ACCESS

- We understand that your personal circumstances can change on a daily basis
- 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.

WORKING WITH OTHER ADVISERS

- We recognise the importance of other trusted adviser relationships that you might have, such as an 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.

www.earleyconsulting.ie

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Earley Consulting
financial advice for life