



# Financial Planning

## Protecting your family and helping you make the most of your hard earned savings

At WTW we recognise that it is not always easy to balance your current financial demands with your future financial goals. That's why we have an experienced team of advisers on hand to support you at every step of the way.

Our dedicated Financial Planning team work closely with families, business owners, self-employed professionals and employees in many of Ireland's leading companies. We help people to make the most of their employment benefits, family protection needs and personal savings.

We can help you design a financial plan, tailored to your own personal circumstances and financial goals, so that you can be sure your money is working as hard as you are.

### Step 1

We will meet with you to discuss your current financial position and your future financial goals.

### Step 2

We will help you design a financial plan and action points, so you can feel confident to take control of your future finances.

### Step 3

We will check in with you regularly to see that you are still on track with your financial planning and help you readjust your goals if needed.

## We will help you determine the best options available and provide you with recommendations on the following:



### Retirement Planning

- Before retirement
- At retirement
- Post retirement



### Investment Planning

- Portfolio Reviews
- Lump sum investments
- Savings Plans



### Protection Needs

- Life & Serious Illness Cover
- Income Protection



### Business Owners

- Shareholder Protection
- Keyperson Cover Protection



### Estate planning

- How to plan for Inheritance Tax liability
- Section 72 Life Assurance Cover



## Why WTW?

WTW is one of the world's leading insurance brokers, risk advisers, pensions and actuarial consultancies. With roots dating to 1828, WTW has 40,000 employees serving more than 140 countries and we have built an outstanding reputation for superior client service.

In Ireland we employ over 550 people in our offices in Dublin, Cork, Limerick and Galway.

## For further information

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## About WTW

At WTW (NASDAQ: WTW), we provide data-driven, insight-led solutions in the areas of people, risk and capital. Leveraging the global view and local expertise of our colleagues serving 140 countries and markets, we help you sharpen your strategy, enhance organisational resilience, motivate your workforce and maximise performance. Working shoulder to shoulder with you, we uncover opportunities for sustainable success — and provide perspective that moves you. Learn more at [wtwco.com](http://wtwco.com).



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