

Value added

We aim to develop a long term relationship with you. International and Irish studies have shown how consumers with long term advisers have substantially greater wealth and this is what we aim to bring to your financial planning.

Financial planning is more than just setting up plans for the future. In our experience, the regular review and monitoring of financial plans is crucial to ensuring success. In a joint study in 2013, PIBA and Standard Life found that people who had annual financial advice had pension funds 75% greater than those not taking such regular advice. In 2012, the CIRANO study in Canada found that advised people had greater net wealth than others and this impact was greater the longer the time of advice (173% after 15 years)¹. This long term wealth effect was explained by higher savings, better investments (more non deposit allocation) and greater use of pension and tax efficient products.

FINANCIAL BROKER
Financial Planning & Guidance

3 times the Savings

Those who have a **Financial Broker** have nearly **3 times** the savings and investments than those who don't.

HAVING NOT USED A FINANCIAL BROKER HAVE USED A FINANCIAL BROKER

Creating your success through Financial Planning

The Key to Success

A long-lasting professional relationship is crucial to our success, so we can help you at each stage of your life, as your circumstances and goals change.

"Good fortune is what happens when opportunity meets with planning"

CONTACT US

MEETING ROOMS

- New Work Junction, Dublin Road, Kilkenny
- IBA, 87 Merrion square, Dublin 2

However, we much prefer the personal touch and to meet you at your place of work or home.

OFFICE

- 📍 13 Burgess Court, Kells, Kilkenny
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Kevin O'Neill T/A O'Neill Independent Financial Consultancy is regulated by the Central Bank of Ireland.

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FINANCIAL PLANNING AND COACHING

YOUR FUTURE, OUR PRIORITY



Your Life, Imagined

We're passionate about empowering you to live the life you want without fear of ever running out of money – and without working a day longer than you need to. Our financial planning service can help you achieve the lifestyle you want, not only now, but in the future. We can build a holistic plan that will deliver the results your desire – and deserve.

Our mission is to help you make smart choices with your money giving you more time to enjoy life, reassured by the peace of mind and clarity we'll give you over your financial future at different life stages.

Our focus is on you and what you want to achieve in life. Money is merely the fuel to ensure that your personal aspirations can be met in full and on time.

Why us

We are truly a boutique business and provide a unique service focused on resolving the financial challenges faced by busy individuals, business owners, professional & executives. We do your heavy lifting so that you can get on with doing what you do best.

What you get

- ✓ Financial clarity & less worry of what your future looks like
- ✓ Peace of mind
- ✓ Financial Planning & Coaching
- ✓ Independent unbiased advice
- ✓ Real financial security for you and your dependants
- ✓ More Wealth, More life, More Choice
- ✓ Saving you time & money

That's what we can do for you. How, by only working with a small list of personal clients enables us to deliver the service & attention you deserve.

Our Mission

Help you gain clarity over your future

Free review service -

Our success is built on getting to know you. This first meeting is always at our expense with no obligation to help you decide whether we can add value to your future. At this meeting we will discuss your existing circumstances, your future plans and explain the service we offer.

If you're happy to proceed, working together we can begin to implement your Financial Plan. Our job is to simplify the process and help you through out, recommending solutions that will help you manage your wealth better, protect yourself and your family against unforeseen events and achieve your retirement goals. You will not be obligated to implement any of our recommendations

Let's get Organised - We understand that most people aren't always as financially organised as they could be. Often new clients arrive with a bag full of paperwork and unopened envelopes. The task of designing a Financial Plan to help you achieve your goals can only be completed when we understand your priorities.

As wholly independent advisers we deal with a number of providers in the market



How We Work

We take a personal approach to our work using a tried and tested process, to really get to know you and understand what you want to achieve.

Main services

1) Protection & Risk Review

Ensure the level of cover you have is appropriate to your needs, cost effective and tax efficient.

2) Retirement Planning

Show you what your pension is worth now and in the future. If you have several different plans working together we can manage these in the one place ensuring they are risk assessed, cost effective and tax efficient.

3) Investment & Savings Planning

We offer a value based service approach aiming to, raise returns whilst reducing risk ensuring they are appropriate to your needs, risk assessed, cost effective and tax efficient.

4) Your financial journey

Financial Planning allows you to understand what needs to be in place to maintain the lifestyle you desire. What resource you have now and what resources you will need in the future to ensure you never run out of money. This puts you in the driving seat!

