

RETIREMENT PLANNING WITH US MAKES SENSE

At Wealth Alliance, we believe Financial Planning is more than just managing your money. It's about your lifestyle goals, ambitions and ultimately achieving **FINANCIAL FREEDOM**.

It's understanding

- **Where you are now.**
- **Where you want to be.**
- **And what you need to do to get there.**

We believe that successful retirement planning is an integral part of your financial plan and is not just about writing a cheque at the end of each tax year, or buying a pension. It's about clear goal setting, efficient analysis, implementation and ongoing monitoring.

When you took the first step on your journey to retirement, that seemingly small decision to optimise your tax relief, has over time, become one of your largest financial assets. Your retirement strategy is an investment in your future lifestyle and deserves careful and continued attention.

Are you confident that you have the time and expertise to maximise the potential of your retirement planning?

Do you know:

- **What pension arrangements you have and with whom?**
- **How your monies are invested and what performance you are achieving?**
- **What you are being charged?**

If you don't we can help you.

- **Review all of your current pension arrangements in terms of investment strategy, cost, performance and objectives to determine suitability.**
- **Recommend the most appropriate strategy for you and assist with implementation.**
- **Monitor your strategy on an annual basis and make necessary changes or adjustments to ensure your plan remains on course.**

We will be with you every step of the way, offering you simplicity and clarity throughout the process. We will provide you with regular updates and ongoing support.

If interested, please contact us on 01 840 60 82 as soon as possible to give us enough time to carry out your review ahead of the self-assessment deadline.