



Your  
Financial  
Planning  
Partner

Reliable  
Trustworthy  
Safe

A comprehensive approach  
to securing your financial future



# How Oakwood helps you

At Oakwood Financial Advisors we help you to discover your life goals and we then develop a financial plan to ensure you achieve them.

## Expert advice and guidance

Oakwood Financial Advisors was established to guide professionals, company directors and business owners to achieve their financial goals. We are a financial planning business that develops comprehensive and tailored solutions, customised to suit each client.

We recognise that your circumstances and financial goals are unique. Therefore, you require solutions that we design specifically for your own individual needs.

## Comprehensive and objective

The Oakwood team develops an overall comprehensive and objective financial plan for you. We work with you throughout the years until your goals are achieved. We are committed to ensuring you make fully informed and effective financial decisions. We help you feel confident and free to live your life to the full, without worrying about money.

We look forward to helping you achieve your life and financial goals.

Ronan McGrath  
Managing Director  
Oakwood Financial Advisors



# Better outcomes for you



## You are better informed

You will fully understand your financial plan. While detailed, it is clear and easy to read. This will empower you to make the right decisions.



## Your financial confidence

We ensure that your plan is right for you. This allows you to live your life free of money worries.



## Comprehensive aims

We support and guide you in relation to all of your personal financial aspirations.



## Tailored solutions

You are unique. We develop tailored solutions that are designed to fulfil your individual requirements.



## Your interests first

We work specifically for you and are accountable to you. We act in your best interests in everything we set out for you.



## Your personal financial guide

We are the expert voice "in your corner", guiding and partnering you on your financial journey.

# How we work with you

Effective financial planning requires committed attention in order to achieve the best outcomes. Our reliable and comprehensive approach ensures the very best solutions are identified and implemented for you.



# Where we can help you

## **Tax planning**

- Minimising your tax liability today
- Future tax planning
- Transferring wealth in a tax efficient way

## **Financial security**

- Protecting accumulated assets
- Protecting your family against death / illness
- Protecting business partners against death / illness

## **Investment & retirement planning**

- Building and managing your investment portfolio
- Tax efficient investing & retirement planning
- Retirement planning with multiple income sources

## **Business exits**

- Planning a successful business exit
- Retirement relief / entrepreneur relief planning
- Succession planning

## **Passing wealth to next generation**

- Tax efficient gifts
- Structured estate planning
- Inheritance tax planning

Some of the services may be delivered in conjunction with 3rd party legal / taxation specialists.

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# Your lifelong financial partner

Excellent financial planning is a process that continues for many years. Your ongoing guidance meetings with Oakwood are regular events at which we review your financial needs and goals and if necessary, adjust your financial plan. These meetings encompass:



### About Oakwood

Building on more than 25 years of financial advisory experience, Ronan McGrath established Oakwood Financial Advisors to deliver specialist financial planning solutions to business owners, professionals and high net worth individuals. Today Oakwood assists a wide range of professionals, self-employed individuals, company directors and members of the medical profession to achieve their financial goals. Oakwood currently advises our clients on assets in excess of €130m.

### Personalised and dedicated

Based in our office on Mount Street in Dublin 2, our team of qualified professionals deliver a reliable, personalised and dedicated service to our clients.

**We work in your best interests to ensure your life and financial goals are achieved.**

Reliable  
Trustworthy  
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