

Do you find that you are too busy with work, family and everyday life to keep on top of your money?

Would you like to have a roadmap for your financial future, designed to ensure that your money works as hard as possible to help you achieve your goals?

Do you think you would benefit from having qualified, experienced professionals actively helping you to manage your money?



Eolas Money

Professional Financial Planners

Eolas Money has the knowledge and expertise to help you plan your financial future...



Our mission

We at Eolas Money are personal financial planning experts, whose primary aims are to help you make the most of your money and achieve your financial objectives. Whether you have one specific aim you want to achieve, or whether you need more comprehensive advice on all ten elements of your money, we will prepare a bespoke, tailored, financial plan for you, designed to ensure the achievement of your financial objectives. We act as the chief financial officers for your money, the trusted professional you can turn to for advice on all your financial requirements.

What we do for you

After we hear from you about what you want to get from our work together, we work with you to research, design, present and implement a comprehensive, personalised, financial plan for your future. This plan is designed to eliminate any waste or inefficiencies within your financial affairs, and to give you the direction and focus you need to achieve your objectives. Our plans can either focus on all ten elements of your money, or on specific elements as per your own personal requirements. Crucially however, by managing the implementation process for you, and by engaging in regular reviews with you, we ensure that the necessary changes and adjustments are made to your plan as circumstances change.

About Eolas Money

Eolas Money was formed in 2009 and has since established itself as a professional financial planning practice for personal clients throughout Ireland. Established by financial wellbeing professionals Brendan Reilly & Jim Stapleton, they have over 30 years of combined experience in the design and delivery of financial planning solutions for their personal clients.

Eolas Money maintains the highest standards of professionalism and we have invested very heavily in the education and professional development of our Financial Planners in order to ensure the highest level of professional advice is provided to all our clients. Apart from holding the prestigious Certified Financial Planner designation, our Financial Planners also hold memberships of the Irish Tax Institute, the Financial Planning Standards Board Ireland, and the Life Insurance Association and are Qualified Financial Advisors. In addition, they have attained the Graduate Diploma in Financial Planning and the M.Sc. in Financial Services from University College Dublin.



We are very happy with the exceptional level of service we have received from Eolas Money and we would recommend them to anyone needing sound financial advice.

The ten elements that make up your money

Income:

- Payslip Reviews
- Employment Benefit Assessment
- Retirement / Redundancy Impact Assessment

Taxation:

- Preparation of Personal Tax Returns
- Preparation of Rental Income Accounts
- PAYE & Self Employed Tax Planning

Inheritance Planning:

- Inheritance Tax Planning
- Section 72 & 73 Insurance Policies
- Will Advice

Banking:

- Existing Banking Strategy Reviews
- Fees & Charges Assessment
- Debit Date Assessments

Retirement Planning:

- Reviews of Preserved Pensions from previous employments
- Retirement Planning – PRSA's, AVC's, ARF's
- Last Minute AVC's

Budgeting:

- Household Income & Expenditure Assessment
- Provision of Personalised Budgeting & Banking Templates
- Ongoing Budgeting Reviews

Property:

- LPT Compliance
- Investment Property Tax Compliance
- Mortgage Acceleration Strategies

Protection:

- Permanent Health Insurance
- Mortgage Protection
- Life & Serious Illness Cover

Mortgages and Loans:

- Mortgages
- Debt Negotiations
- Loan Restructuring

Savings and Investments:

- Risk Prolife Assessments
- Educational Savings Plans
- Investment Reviews

We have always had a fragmented approach to managing our finances and decided the time was right to become more efficient in our planning. During our initial meeting we were very much put at ease by Brendan and he took the time to understand our financial situation. He then carried out a comprehensive assessment and developed strategies to help us implement our financial plan.

How we help you



First, we listen to you to learn about your past experience with money and to find out what you want to get from your money in the future.



Next, we examine carefully the nature and value of every aspect of your current household income and expenditure, making sure they are in alignment with your objectives.



Then, we prepare a comprehensive plan for your financial future, setting out the changes you need to consider making to ensure you reach your goals.



Finally, through ongoing, active management of your money, we implement the necessary changes for you to ensure that you get the most from your money and that you remain on track to achieve the goals you have set yourself.

The result of having joined Eolas Money is that our tax affairs are now up-to-date for the first time. With a healthy rebate from Revenue, an unexpected bonus, our short-term loans have been repaid, we have a structure in place for our children's education and the suitability of our mortgage, life insurance, health insurance and pension plans have all been reviewed with more favourable arrangements having been made, where advisable. In short, Brendan has ensured that our money is now working harder for us.

K & M Sexton, Wexford

Accessing our services

Our initial meeting with you is conducted at our expense and is designed to assess the areas of your personal finances where we can help. Subsequently, should you wish to engage our help, our services can be accessed in a variety of ways ranging from once-off fee based advice on specific areas of your finances, right through to monthly membership of our Eolas Money Academy. We will happily outline all of our engagement options with you during your initial meeting.

What our Customers Say About Us

*Eolas Money have provided practical, professional and expert financial planning in a comprehensive, no-nonsense manner. **We would highly recommend Eolas Money to anybody who wants sound advice and direction on all of their financial matters.***

D&F Mulcahy, Mallow, Co. Cork.

*We are delighted we availed of the services of Eolas Money. We found the service offered to us extremely thorough and professional. We received much needed help and advice on all aspects of our finances and now as a result we have a much better understanding of our tax affairs, pensions, health insurance, life insurance and investments and **we are amazed and delighted by the savings we've made, we even received a tax rebate.***

D & A Smith, Dublin



We would have considered ourselves good with money but perhaps lacking an overall structure and long-term plan. The team at Eolas Money provided a detailed analysis of our current financial situation which highlighted many areas we knew needed improvement but also came up with some surprising elements.

Having completed a number of tax returns in recent years we thought we were up-to-date but Eolas Money found areas where we had overpaid tax and were proactive in dealing directly with the Revenue Commissioners to resolve this. They also helped us consolidate our diverse pension plans so that we are now confident of our financial security at retirement. The structure they have given us in day-to-day budgeting and spending has allowed us better manage the present while also saving for the medium and long-term.

*We would consider hiring Eolas Money to have been an excellent investment in sorting out our finances and **would not hesitate to recommend them.***

C & A Flynn, Co. Tipperary.

What do you do when the Government keeps changing the goal posts re taxes, job conditions and pension plans? How do you live reasonably well while responsibly planning for an insecure future? Where do you go to find value for money advice that leaves you in control of your finances with the assurances of accurate, up to date information?

Meet with Eolas Money like I did and you will stop being anxious about your money matters.

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  EolasMoney

FINANCIAL SECURITY

YOUR GOALS ACHIEVED

PEACE OF MIND



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