



Eolas Money

*Helping You on
Life's Financial journey*

ORGANISATIONAL FINANCIAL PLANNING FLOWCHART



1. Your Company

- ▶ Shareholder Agreements
- ▶ Share Buy Back Insurance
- ▶ Key Person Insurance
- ▶ Holding Company Mortgages
- ▶ Wealth Management



2. You, The Business Owner(s)

- ▶ Cashflow Modelling
- ▶ Death in Service
- ▶ Health Insurance
- ▶ Executive Income Protection
- ▶ Pre & Post Retirement Planning
- ▶ Small Benefit Exemption



3. You & Your Family

- ▶ Wealth Management
- ▶ Cashflow Modelling
- ▶ Children's Educational Savings
- ▶ Mortgage Protection
- ▶ Serious Illness Cover
- ▶ Maximising Household Income



Eolas Money

Accountants

Certified
Financial
Planner ®



Our mutual
clients

Solicitors

Why Eolas Money?

Jim Stapleton has 25+ years' experience specialising in creating strategic financial plans tailored to the unique needs of Entrepreneurs and Business Owners to enable our clients achieve their personal and financial goals.

Our Financial Planners hold the prestigious Certified Financial Planner (CFP®) designation and are members of Financial Planner of Ireland (FPI), the only organisation specifically formed to raise and promote financial planning standards within Ireland, with Brendan Reilly being a former Chairperson and board member of FPI.



Get in Touch

 jim@eolasmoney.ie

 Ard Gaoithe, Commercial Centre, Clonmel, E91 V2N8

 Jim: 087 2924131

 www.eolasmoney.ie