

# Financial Planning

Protecting your family and helping you make the most of your hard earned savings



At Willis Towers Watson we recognise that it is not always easy to balance your current financial demands with your future financial goals. That's why we have an experienced team of advisers on hand to support you at every step of the way.

Our dedicated Life and Pensions team work closely with families, business owners, self-employed professionals and employees in many of Ireland's leading companies. We help people to make the most of their employment benefits, family protection needs and personal savings.

We can help you design a financial plan, tailored to your own personal circumstances and financial goals, so that you can be sure your money is working as hard as you are.

## STEP 01

We will meet with you to discuss your current financial position and your future financial goals.

## STEP 02

We will help you design a financial plan and action points, so you can feel confident to take control of your future finances.

## STEP 03

We will check in with you regularly to see that you are still on track with your financial planning and help you readjust your goals if needed.

**We will help you determine the best options available and provide you with recommendations on the following:**



### Retirement Planning

- Before retirement
- At retirement
- Post retirement



### Investment Planning

- Portfolio Reviews
- Lump sum investments
- Savings Plans



### Protection Needs

- Life & Serious Illness Cover
- Income Protection
- Post retirement

## Why Willis Towers Watson?

Willis Towers Watson is one of the world's leading insurance brokers, risk advisers, pensions and actuarial consultancies. With roots dating to 1828, Willis Towers Watson has 40,000 employees serving more than 140 countries and we have built an outstanding reputation for superior client service.

In Ireland we employ over 600 people in our offices in Dublin, Cork, Limerick, Galway and Belfast. Our experience and expertise in many industries enables us to provide an unrivalled service to our clients.

### For further information:

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