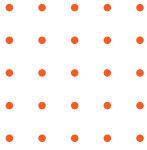




Our customised financial planning
model gives you the security of
knowing your future is taken care of.
So you can live your life today.

www.futureplanireland.ie





Future Plan

Wherever you are on your journey, we can help

At Future Plan, we specialise in the next generation of financial advice and wealth management. Using goal-based planning software, our experienced team will customise a plan that works for you, your family and your future.

The benefits of a customised financial plan

Clarity

Having a plan in place gives you the clarity and security of knowing where you are headed. This allows you to enjoy today knowing that your future is in your own hands.

Transparency

We work entirely in your best interests when creating your customised financial plan. We charge a fee to design your plan along with an annual charge to keep you and your investments on track. We fully disclose all fees, charges and commissions at the outset.

Maximise results

We help you maximise the benefits of your earnings and assets so that you are no longer hoping that you are making the right decisions: you know that you are.

Active guidance

It's impossible to predict the future and financial goals can sometimes go off track. However, with the advice and support of our team, we can adjust your course when the unpredictable occurs.

Our services

We go further than the traditional approach of making large financial decisions in isolation of your lifelong goals. We review your options for the following services with your customised plan in mind:



Buy your dream home

MORTGAGES

We will show you how your mortgage will interact with your overall financial plan, ensuring that your budget allows you reach all of your lifetime goals. We will also prepare your application to the lender and liaise with all relevant parties on your behalf. We have extensive experience of supporting people throughout the entire home buying process and we can guide you every step of the way.



Plan for the unexpected

PROTECTION

The best laid plans can unravel quite quickly in the event of an illness, disability or death. We will run '*what if*' scenarios to provide guidance around how best to protect you and your family should the unpredictable happen.



Invest for the future

INVESTMENTS

Thinking about investing can seem daunting. However, we provide a thorough assessment of both your attitude towards investing along with your capacity to invest. We work from carefully prepared 'house views' where we bring our investment partners together to provide appropriate investment strategies tailored to our clients risk profile.



Save for retirement

PENSIONS

Retirement should be a continuation of your life today and all the things you enjoy spending time on. Through careful planning and goal setting at the outset, we will guide you as to how best to meet your retirement goals, whether you are an employee or self-employed.

A key element in your success is constant reviews of the plan to ensure that you remain on target at all times and will reach your goals. This will give you financial freedom both now and in retirement.

How we manage your journey



Plan

We will get to know you and your goals, taking into account your income, your expenditure and assets you may have. We then design a plan to enable you to reach your lifetime goals, while ensuring you are suitably protected against the unpredictable along the way.



Implement

Having designed your financial plan, we will set out separate recommendations or 'solutions' to achieve your goals. Each solution will be detailed in a document outlining why it is the most suitable solution for you.



Evaluate

Like most things in life, plans can change. We believe that it is vital that we keep in regular contact with you to ensure that you are always moving in the right direction. Our work never finishes and we are with you for your lifetime.

About us

Mark Nugent BA (Hons), APA

Mark holds an Honour's degree in business, is an accredited product advisor and is a member of his representative bodies sub-committee and main board.

As well as working with his clients on their own financial plan; Mark keeps a close eye on his own financial goals and having worked in the industry since 2000 brings a wealth of personal experience.

Mark is married with two children and has lived in north County Dublin since 2002. Mark enjoys wine, movies and relaxing in his spare time along with volunteering as a coach with his son's local soccer team.

Andrew Nolan ACMA, CGMA, QFA

Andrew is a Chartered Management Accountant and qualified Financial Adviser with over 25 years experience in financial services.

Andrew is the Chairperson of a local social club for people with special needs and sits on the finance sub-committee and main Board of a large All Ireland not-for-profit charity, which provides services to people with additional needs.

He has lived and worked in north County Dublin for the last 25 years and he is married with two sons. He is an avid golfer & fisherman and loves spending time with his family and friends, which his goal-based financial plan allows him to enjoy.

Take the first step

We offer a free one hour consultation. Simply fill in the form on our website or give us a call and ask to 'schedule a consultation'.

Future Plan

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