



WALLSTONE

The Pension & Investment Experts

For over 20 years, the Wallstone team has delivered the type of pension, investment and financial advice that secures peace of mind, achieves goals and realizes dreams, both big and small.

We're a small firm with big impact. We deliver personal, friendly, first-name service with results that keep our clients smiling.

As a professional financial services company, we have the flexibility to assess financial opportunities without bias, matching those opportunities to client objectives and requirements.



If you'd like more security for your financial future, or if you'd like a second opinion on whether your current portfolio still makes sense, get in touch to arrange a consultation.

Stop putting it off, your future will thank you for it.

"We wouldn't be with Wallstone if it weren't an Independent Financial Advisory company. Thanks to their tailored, personal service, we feel protected and that's very important for us and our children."

Dr Bernie Lynch & Paul O'Brien,
Limerick

"Gerry is easy to talk to, has no hidden agenda, gets things done and I like him. He guides you and puts you on the right track."

Breda Gavan, Business Owner,
Limerick

"Ruairi is very personable. He takes time to understand your goals, listens and understands what you need, while others are too focused on packages."

Michael Coffey, Retired MD,
Ennis, Co. Clare

"At 59 I was unsure and concerned about my pension. I'm 74 now and with Wallstone's guidance things have worked out well"

Frank O'Sullivan, Quantity Surveyor,
Limerick

"At our time in life my wife and I want a reasonable income and security, and Wallstone is providing that role admirably"

John & Breda Duggan, Retired Dentist,
Ennis, Co. Clare

"I've been a client of Wallstone's for many years and have always found their advice to be solid. Gerry is honest, freely gives of his time and has no problem meeting at my Practice in order to accommodate my schedule, which shows great personal service".

**Dr Aidan Culhane,
Limerick**

"I would give Gerry and Wallstone 11 out of 10 if it were possible. They are extraordinarily good, professional and trustworthy. They took the time to understand our needs and their modeling tools are able to instantly chart our options, which is amazing. They are top of the range as far as I'm concerned".

**Aidan O'Connell, Retired C.I.O,
Limerick**

"Diarmuid took the time to understand my retirement goals and was able to put the necessary steps in place for me to achieve those goals in a manner that I always understood and felt totally comfortable with".

**Stephen Murphy, Director of Care,
Cahercalla Nursing Home, Co. Clare**

"Gerry is personable and takes an individual interest. He is honest and gives the 'warts and all' view of Wallstone's' services. He knows my attitude to investments and I trust him".

**Dermot Mahony, Dentist,
Co. Clare**

"For me, there is no 'fear factor' in working with Wallstone."

**Paul McCarthy, Partner,
BGMS Solicitors, Limerick**

Our work is all about securing the financial future of our clients and that's why we've included so many client testimonials and impact statements within this leaflet.

Our clients trust us. We give them security, direction and make their lives both easier and wealthier.

Examples of some of the benefits we provide to clients include:

We take the pain out of pensions

- Assessing your situation and what you need in preparation for retirement, irrespective of whether you are in your 30's, 40's, 50's or 60's.
- Giving you back control of your pension and investment decisions.
- Reviewing existing pensions to make sure they are cost efficient and profitable.
- Clearly communicating tax, risks and income drawdown options in a way that you understand.

We help your investments thrive

- Reviewing existing investments so that they are diversified, cost efficient and profitable.
- Providing investment advice when and where appropriate.
- Building an investment portfolio that's in line with your financial objectives and aspirations.

We protect your business

- Delivering guidance on key business issues such as business owner insurance and succession planning.
- Developing motivational employee benefits including company salary replacement and pension schemes.

We help protect you, your family & your future

- Making sure your life assurance cover is adequate to your needs, and the needs of your family.
- Reviewing potential inheritance tax liabilities on your estate and its implications.

Wallstone

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