

**Make the most of your money**  
**Get 20% off**  
**tax & financial planning services**  
**Book your Free Consultation now**  
**Call 1850 88 24 24**



tax & financial planning centre



financial  
planning



mortgages



savings  
investments



tax  
advice



pensions



motor, health  
& life cover



money  
management



protect  
your income

[www.thewealthshop.com](http://www.thewealthshop.com)



**Chat to one of our independent advisers today! ☎ 1850 88 24 24**

### **Who are we?**

**We are independent tax & financial planners. Quite simply we sort out your taxes and help you make the most of your money.**

### **What do we do?**

- ☑ We review your current tax & financial circumstances.
- ☑ We offer you expert impartial tax and financial advice delivered by qualified tax and financial professionals.
- ☑ We design a personalised tax and financial plan for you. We look to get you the best value products with the right level of cover and at the right price.
- ☑ As your personal tax and financial advisers we represent you and work on your behalf with all banks, financial service companies and Revenue.
- ☑ We monitor and review your taxes and finances regularly.

**The Wealth Shop Ltd (t/a the wealth shop) is regulated by The Financial Regulator. All tax work is excluded from this regulation and is provided by our Irish Tax Institute Registered Tax Consultants.**

### **How do we work?**

Your first meeting with us is a complimentary consultation. This allows you to meet with us, understand how we operate, meet your assigned adviser and discuss your personal tax and financial circumstances.

It allows us to understand your requirements and quote you for future work required.

We work with you on a project basis. This means no hourly rates or hidden charges apply i.e. no nasty surprise bills received at the end of the project.

Payment is required upon commencement of your project payable by cash, cheque, credit card or laser. This allows us to get to work on your project straight away.

### **Why choose us?**

We deliver exceptional tax and financial services at an affordable price - offering you real value for money. We are a team of friendly un-intimidating professionals who go the extra mile to ensure that you get the very best from our services.

**Please read what our clients say about us on our website [www.thewealthshop.com](http://www.thewealthshop.com)**



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Everyone has to pay taxes but not everyone is claiming all of the tax allowances or credits they are entitled to. Are you one of those people who says, "I must claim back my expenses". Truth is, most people don't know where to start. The good news is that, we do! Our team of tax professionals will review your taxes, give you all the tax advice you need and process all your paperwork!

**See below our tax services that we can help you with. As a GroupScheme member you can avail of 20% off your fee. Just arrange your free consultation today!**

## PAYE taxes

### What's covered?

- Tax Review
- Medical Expenses Review
- Marriage Tax Review
- Home Carers Allowance
- Payslips Review
- Medical Insurance Review
- Service Charges Review
- Professional Tax Advice
- Tax Credits Review
- Dental Expenses Review
- Single Parent Allowances
- Tuition Fees Review

Depending on your particular tax circumstances we will give you all the tax advice you need!

## Self employed taxes

### What's covered?

- Current tax position reviewed
- Tax Returns
- Tax Relief Review
- Plus basic tax allowances, credits review
- Form11/12
- Tax Registration
- Tax Planning & Advice
- Profit & Loss a/c
- Vat Registration & Advice
- Pension Advice

## Additional tax services

- Rental Income
- Redundancy
- CGT /Shares
- Book Keeping
- Revenue Audit
- Employment award
  - Options
  - Restricted Stock Units
  - Shares

**Arrange a free consultation and get 20% discount off our tax & financial services. Call us 1850 88 24 24 today.**



If you own an investment property or have multiple properties and are receiving rental income, you must file an annual tax return to The Revenue Commissioners whether you are making a profit, a loss or just breaking even.

Our team of Registered Tax Consultants are here to advise you and process your return efficiently.

## Investment property tax returns

### What's covered?

- Preparation of rental Income & Expenditure accounts for each property.
- Analysis of rental expenses for each property per year.
- Capital Allowances claim
- Preparation and filing of the relevant tax return with Revenue (Form 11 /Form 12) for each year.
- Investment property tax advice. We'll show you how to manage your property expenses and how to minimize your tax bill year on year.



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Wealthmap is our unique financial planning system. If you want to get a complete review of your entire financial life then this service is for you. Your appointed qualified financial adviser (QFA) will work with you through your finances from start to finish. We will assess your income, your expenditure, all your current financial products and policies and get an understanding of your financial goals and concerns. Once we establish your position we will formulate a plan to save you money, get the right level of cover, plan for the future and make the most of your money.

## what's covered?



financial  
planning

A full financial review is carried out to get a complete understanding of your current financial circumstances. This is the starting point to get you on the road to becoming 100% happy with your finances.



money  
management

We review your income and expenditure and create monthly budget for you to help you manage your money better, if required. Are you leaking cash and spending foolishly? Can you account for every cent you earn?



mortgages

What rate is your current mortgage? Is there a better rate out there for you? Do you have a plan to pay the mortgage off early? Can you overpay your mortgage and save thousands in interest payments plus knock a couple of years off the term? Let us review your mortgage(s).



motor, health  
& life cover

Put your insurance policies under the microscope. Do you have the right level of cover? Are you over insured or under insured? Are you getting the best value on the market for all your motor, health, home and life cover? Do you need protection against illness or loss of earnings? We'll review all your insurance requirements and get you the best products on the market to suit your needs.



pensions

Do you have a pension? How is it performing? Are you contributing enough to retire comfortably at 65? Do you have a retirement plan? Allow us to review your current pension or get started with a new pension plan.



savings  
investments

Do you have a lump sum to invest and don't know what to do with it? Where's the best place to put it? Should you put it off your mortgage or into a short term investment? Should you put it into a high interest deposit account or into an investment bond? Let us help you make informed financial decisions regarding your savings and investments.

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## what our clients say about us...



Below you will find just a small sample of the genuine, unedited comments from our satisfied clients.

"Richard & his team at The Wealth Shop were recommended to me by a colleague last year. This turned out to be one of the best personal recommendations I've ever been given! Richard was able to make sense of the mess that was my previous 3 years tax returns filed by my previous accountant. He managed to put them right & claim back a substantial amount of money for me in the process. I found Richard to be thoroughly professional, diligent, personable & always contactable (refreshing in today's world). I will be using their services from now on for all my tax & financial planning. I cannot recommend The Wealth Shop enough!"

**Eamon Hayes**  
Swords, Co Dublin

"Dealing with The Wealth Shop was one of the most straight forward experiences I have ever had with financial planning. Richard and Louise were very diligent and committed in getting the best mortgage, insurance and life assurance package for my family and I. Above all, communication was excellent which is a rare quality in modern Irish customer service. I will definitely be dealing with them again in the future."

**Captain Andy Redmond**  
Aer Lingus Pilot

"As a very busy surgeon with no business or money sense I found The Wealth Shop to be absolutely brilliant from the very beginning. The brochures and products are clear and easy to understand. However, the essence was to be found in the quality of my Financial Adviser (Caitriona Coyne). She was very pleasant and sincere while remaining extremely professional and efficient. She asked me what she needed and took care of the rest, just like that. A few weeks later I found several thousand Euros tax refund in my bank account! I have already recommended The Wealth Shop without any reservations whatsoever to several of my colleagues and would certainly come back in the future. Thank you!"

**Dr. Victor Pena**  
Surgeon

"A massive thank you to you and your team for the help you have given me and my family over the last 12 months. The Wealth Shop has become a major part of all financial planning for me, my family and my business. Through sheer determination Richard and his team managed to recoup for me in excess of €4,000 in taxes last year. Anybody considering working with the Wealth Shop should do so immediately."

**Richard Judge**  
General Manager, PSL Ireland



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**Irish Taxation  
Institute**

