



curran  
futures

Possibility  
**Awaits**

## Wealth

Are you in a transition stage of life?  
Perhaps moving from accumulating  
assets to providing for your income  
needs? Do you worry if you have  
enough for the lifestyle you want?  
We can help...



# Future **Wealth** Programme

Do any of the following statements describe where you are on your journey? If so, our Future **Wealth** Programme could be for you.

- You are approaching retirement, in the process of retiring, or have been retired for a number of years.
- You have built up assets and other income sources over your lifetime by being prudent and sensible.
- You are concerned that there is not enough money to cover your costs for the rest of your life, especially in case of an emergency.
- Ideally you would like to live the life you have planned for. Travel and other interests should be your priority.
- You have investment experience through pension funds, property and savings, but never addressed them as part of an overall Financial Plan.
- How your income will be sourced over the coming years is a key consideration. How tax might impact that income is also really important.
- You worry about what will happen to your estate in the event of illness or death. You want to put your affairs in order.
- Other than your spouse or partner, no one else knows your financial circumstances. You are looking for discrete & trustworthy engagement with a firm that will always maintain strictest confidence on all your matters.

## Your Programme Benefits.

- Premium 'Future Wealth' Welcome Pack.
- A bespoke Financial Plan, with particular focus on the right **Drawdown Strategy** for you.
- Presentation of this Strategy in a clear and understandable Report.
- Creation of a dedicated income producing Investment Portfolio.
- Tax Management Service for your entire asset portfolio.
- Financial Concierge Service – including connections to professional advisors in associated fields.
- On Call Access to the Future Wealth Planning Team with a <24hr call back promise.
- Quarterly Updates and Bi-Annual Face to Face Review Meetings.
- Access to our Client Portal on [curranfutures.ie](https://curranfutures.ie) where you can access all your documents, read specialist articles and avail of premium content.
- Invitations to exclusive events dedicated to complimenting your Future Wealth Programme.

Join our Future **Wealth** Programme today, for only €200 per month. There is no fixed contract so you can stay with the programme for as long as you want. It's a subscription model that puts you firmly in control of your wealth.