

60 Second

End of Year (Pre Tax Time) Financial Health Check



Use this 60-second Pre Tax Time – financial health check to see if you need a more thorough examination of your Financial Planning, Pension, Insurance or Investment needs.

YES ✓	NO ✓	
<input type="radio"/>	<input type="radio"/>	Are you approaching or over age 55 and have not taken advantage of the Transition to Retirement strategy?
<input type="radio"/>	<input type="radio"/>	Have you reviewed (or considered) how your savings are structured? – This can drastically increase your future wealth! Changes in your circumstances may affect your existing strategy so you should review this annually.
<input type="radio"/>	<input type="radio"/>	Have you accessed your share of the Govt's Pension Contribution? - This can potentially provide a 20%/40% return on your money by making a personal contribution this year...!
<input type="radio"/>	<input type="radio"/>	Do you have personal Income Protection? - Not only does this protect your most important asset - Your Income , but is <u>fully TAX DEDUCTIBLE</u> at your marginal rate.
<input type="radio"/>	<input type="radio"/>	Have you considered establishing an Investment Strategy? - Not only can this <u>increase your overall wealth</u> but also provides 'tax advantage'!
<input type="radio"/>	<input type="radio"/>	Annual Capital Gains Tax Exemption of €1270 – have you utilised yours?
<input type="radio"/>	<input type="radio"/>	Are you able to Minimise Capital Gains Tax? – By realising capital losses on non-performing investments this can offset realised capital gains.
<input type="radio"/>	<input type="radio"/>	If you're Self Employed, have you made your full 'deductible Pension contribution' for 2019? – claim up to 40% back until Dec 10th Deadline . These contributions are capped, so make sure you make the most of each year!
<input type="radio"/>	<input type="radio"/>	EII Scheme – A tax relief incentive scheme aimed at encouraging individuals to provide finance to qualifying trading companies.
<input type="radio"/>	<input type="radio"/>	Tax credits & Rebates – keep your receipts if you are eligible for the children's college fees refund and medical expenses tax rebate. You can claim back for up to 4 years so it might not be too late.

If you answered **NO** to any of these questions, then please take advantage of a free financial assessment.

To arrange your free financial assessment, please call **091 778677** or email: advice@olg.ie

Contacting us could be the best financial decision you have ever made...!

[Click Here to Book a Sort My Finances Strategy Session](#)

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