COMPASS
PRIVATE WEALTH

Investment Management

Pre-Retirement Pensions

Post-Retirement ARFs

Succession Planning & Protection

www.CompassPrivateWealth.ie

About Compass Private Wealth

Compass Private Wealth was set up in Dublin in 2014 to deliver independent and sophisticated wealth management and financial planning advice to Individuals and Families throughout Ireland.

We manage private client funds as well as assets held through pre-retirement pensions, post-retirement pensions (ARFs), family partnerships and trusts.

Key Philosophies

Independence:

- We pride ourselves on being completely impartial and objective in all recommendations to clients.
- Our model is to be our client’s trusted advisor with their best interests in mind at all times.

Transparency:

- In all dealings with our clients, we ensure that they fully understand all of the intricacies and complexities of their pension or investment portfolio.
- We prioritise two-way communication with clients and encourage regular review meetings and calls.

Bespoke Service:

- Fundamental to our model is understanding the client first and what their particular financial affairs, objectives and appetite to risk are.
- We tailor all of our advice to a client’s specific needs and circumstances.

Third Parties

We undertake extensive due diligence on any third party providers we use to enhance our client service offering.

- When implementing investment portfolios, we use either a stockbroking platform or a life company for custody and administration.
- When researching and recommending investments, we use best-in-class global research and international fund managers with proven track records to implement our ideas.
- For pensions, we use third party administrators, trustees & Qualified Funds Managers for pre-retirement pensions and post-retirement ARFs.
- We also work with specialist accounting, tax and legal advisors to ensure that our clients get expert advice at all times.

Founder and Managing Director Jonathan Sheahan has almost 15 years of experience in Investment Management, Pensions, Retirement Planning and Management Consultancy in various institutions in Dublin.

Jonathan is a Qualified Financial Advisor (QFA), a Registered Stockbroker and a fully qualified Certified Tax Advisor (CTA) through the Irish Taxation Institute.

Our Services

Investment Management

- Asset Allocation
- Global Diversification
- Best in-class investment selection
- Choice of investment types

Pension Services

- Buy Out Bonds
- Small Self-Administered Schemes
- PRSAs
- Approved Retirement Fund (ARFs)

Succession Planning

- Inheritance Planning
- Family Partnerships
- Trusts

Financial Planning

- Planning for Retirement
- Protection & Life Assurance
- Goal-based modelling

At Compass Private Wealth we strive to provide our clients with best-in-class, globally diversified investment and pension portfolios with an asset allocation that is best suited to their needs. We do all of this in a transparent and efficient manner while remaining fully independent at all times

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