Park Worth Financial Limited

. . . financial advice from a trusted expert whenever it's needed .

Corporate & Personal Pensions • Corporate & Personal Investments
Corporate, Personal & Keyperson Protection • Income Protection • Inheritance Tax Planning

*“ 20 years from now,
you will be more disappointed by the things you didn’t do
than by the ones you did do ”*

Mark Twain

Park Worth
Financial Limited

WHO ARE WE?

- Over 30 years in the business of Financial Planning
- Professional Financial Planning and advice to both Corporate & Personal Clients
- Offer a bespoke, confidential and highly professional service
- Service is centred on getting to know you - your personal financial needs
- Provide tailored recommendations to help you meet your financial goals

MCKEVITT ARCHITECTS

"Park Worth Financial has given us a fantastic service by giving us sound financial advice. Conor has a particular gift for explaining and helping us to understand the more complicated side of things!"

Park Worth
Financial Limited

SERVICES WE PROVIDE

- Full Financial Review & Bespoke Solutions
- Retirement Planning
- Business, Personal and Family Protection
- Savings & Investments
- Inheritance Tax Planning

PICKERINGS LIFTS

"Conor took over the management of our Co-Directors Protection some years ago. We discovered an issue that needed to be corrected with the policy. Conor organised to have the issue corrected in a very prompt manner with no fuss. Conor also looks after and advises us on our Company Directors' pensions. We receive regular updates and would recommend Conor without any hesitation."

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WHAT DISTINGUISHES US

- We do for our clients what we would do for our own family
- We work towards developing a real understanding of our clients' requirements and break down the solutions into simple manageable steps
- We build long-term relationships with our clients, built upon mutual trust, putting your interests at the centre of our services
- We strive for excellence in all we do
- Our ability to explain and help our clients to understand financial terms, making them feel comfortable that they are making informed decisions to secure their financial future

MOYMATERIALS
Waterproofing & Insulation Specialists

"Conor has been looking after the Co-Directors' Protection Cover and Company Pension Scheme for Moy Materials for the last 11 years. We are very happy with the service we have received and confident that Conor's advice in structuring the Co-Directors' Protection has both ourselves and our families well protected."

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OUR TEAM

Our professional and expert team makes us what we are.
Our combined experience and Conor's expertise mean that you, our client, gets the very best financial advice and guidance at all times.

Conor Moen
Managing Director

Conor has over 30 years' experience in Financial Planning and Advice, joining the industry in 1987. Conor held various positions over the years in Canada Life & Irish Life before setting up his own organisation and is a Certified Financial Planner.

Karen Kinsella
Compliance Administration Executive

With over 30 years' experience in Financial Services, Karen came to work with Park Worth Financial in 2014 and currently supports the team in all areas of general brokerage administration with a particular focus on compliance.

Emma O'Reilly
Business Development and Marketing Executive

Emma holds a BSc in French and Social Policy from Queen's University Belfast and a Postgraduate in Human Resource Management. Before coming to Park Worth Financial, Emma held positions with Citigroup, KPMG and Bank of Ireland.

Eilish Moen
Office and Accounts Manager

Eilish has many years' management experience in the industry. Eilish now manages the Accounts function for Park Worth Financial assisting with the day to day financial management of the business.

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HOW CAN WE HELP YOU?

Is my business fully protected from the financial consequences of the untimely death of a fellow shareholder?

Will I have enough cash to maintain my lifestyle when I retire?

Will we have enough to fund our children's education, their wedding or other milestones?

When did you last review your financial position to ensure you can meet your short-term needs and long-term goals?

What would my family do if I became ill or died too soon? Will they be financially secure?

Does your pension scheme include death in service and income protection for your loyal employees?

Are we maximising pension contributions in the most tax efficient way?

How much of your estate have you planned to leave to Revenue? Will your loved ones be burdened with a tax bill?

Book your meeting
with Park Worth Financial Limited

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