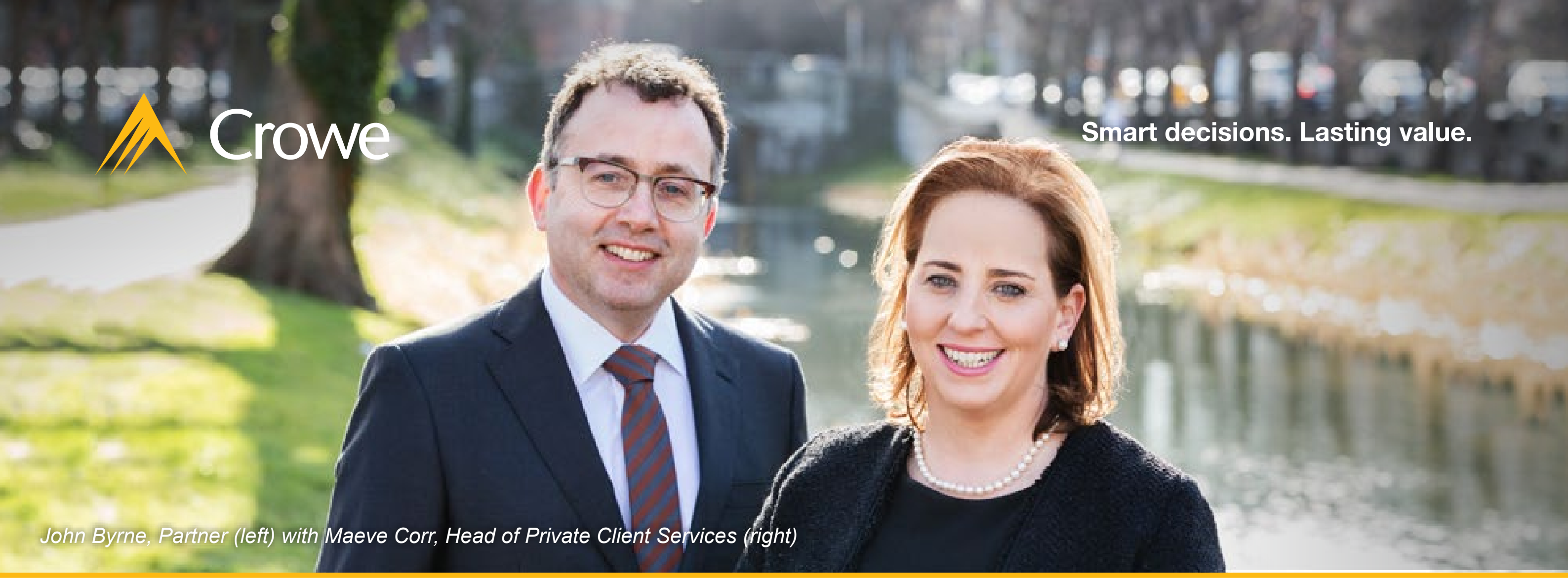

John Byrne, Partner (left) with Maeve Corr, Head of Private Client Services (right)

Private client services

At Crowe we offer an independent advisory service to support our clients and their families with tailored financial, regulatory and compliance advice to match their needs.

An independent advisory service

We provide a single point of contact where all personal and family interests are overseen and proactively managed by our experienced team. Our partner-led approach helps identify and properly address any hidden opportunities and risks with your personal or family affairs, which might have been missed by working with multiple advisors.

Your personal advisor

Maeve Corr is head of our private client services. As a chartered tax advisor and Qualified Financial Advisor, she has over 22 years' experience advising private clients and their families on their financial affairs. Maeve focuses on issues that clients may not have considered and applies a strategic approach to family finances that clients normally only apply to their business assets.

She has gained a wealth of experience throughout her career working in senior roles across the leading global and domestic private banks and accountancy practices. She also ran her own private consultancy business.

Personal financial review and strategy

Many of our clients are high-net-worth individuals who are time-poor and busy focusing on managing their business interests. As high-net-worth individuals, our private clients often have complex financial interests which involve family members and span a range of assets, often across jurisdictions, that require careful planning and management.

We work with you to add clarity and focus to your personal financial goals, helping to develop and implement a specific plan to meet your needs. We offer a bespoke financial review, giving you a clear understanding of your financial assets, enabling you to make informed decisions for yourself and for your family's future.

Our goal is to build lasting relationships, providing ongoing support and addressing any challenges that might arise as circumstances and priorities change. Through our proactive approach we will assist in managing and optimising your assets, leaving you free to focus on other aspects of your business and family life.

Family offices

There are times when our private clients' asset portfolios become complex enough to require additional assistance to meet governance, compliance, administration and asset monitoring needs. This can be time consuming and daunting as you try to juggle business and personal matters.

Crowe can assist with the structuring, setup and operation of a family office, providing cost-effective oversight support and proactively briefing you on any deadlines or issues you might face.

We can provide ongoing support with regular reviews to ensure your strategy matches your goals, risk parameters and, most importantly, cashflow requirements. We can provide regular updates throughout the year to keep you appraised of any issues that need focus, or to plan for upcoming events. Our goal is to build a lasting, fruitful relationship where we continually look to add tangible value at each point.

Our approach

We draw on the wide range of disciplines and expertise within our firm to expertly look after you and your family's financial affairs. This collaborative, multi-disciplinary approach helps uncover any gaps in your strategy and quickly establish viable solutions.

Our holistic approach ensures we consider all of you and your family's goals and requirements, from governance through to succession planning, working proactively and effectively with you at each stage of your financial life cycle.

We bring a level of clarity and focus to your personal financial strategy, helping you identify key priorities and keeping you up-to-date and fully informed without being overwhelmed or burdened with administration.

We differentiate our services by not being a creator or provider of financial products, enabling us to work independently with your advisors and asset managers. We are experienced at coordinating with any wider advisory team you may have, such as banks, investment advisors, legal firms and property management teams, to ensure your best interests are met.

Our services

Providing peace of mind with a holistic service offering

About Us

Established in 1941, Crowe is a leading accountancy and business advisory firm in Ireland. Throughout our 75-year history, we have developed an unrivalled understanding of the Irish business environment and built a national reputation in auditing, tax and business consultancy.

We work with a variety of clients across commercial and public sectors. Our services include Audit & Assurance, Tax, Corporate Insolvency & Recovery, Corporate Finance, Consultancy, and Outsourcing.

We are also independent members of the eighth-largest accountancy network in the world, with colleagues in over 750 offices across 130 countries. Through this global reach we are able to offer clients a seamless service when trading internationally.

Contact

Crowe
Marine House
Clanwilliam Place
Dublin 2

Tel: +353 1 448 2200
www.crowe.ie

Maeve Corr
Head of Private Clients
Tel: +353 1 448 2367
maeve.corr@crowe.ie