



Trusted Advisor  
Group®



# SUPPORTING

your business in 2016 and beyond

[www.trustedadvisorgroup.ie](http://www.trustedadvisorgroup.ie)

# OUR EXPERIENCE AT YOUR SERVICE

By becoming a select member of Trusted Advisor Group, you can avail of cost-effective expertise in every aspect of running a successful brokerage, including:



COMPLIANCE



TECHNICAL  
SUPPORT



TAX & LEGAL  
ADVICE



MARKETING  
& PR



PERSONAL  
COACHING  
& TRAINING



BUSINESS  
PLANNING  
& STRATEGY



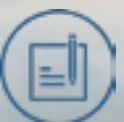
LIFESTYLE  
& HEALTH



IT SUPPORT



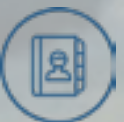
VOYANT  
TRAINING



INVESTMENT  
ANALYSIS  
& RESEARCH



WEB,  
PRINT &  
DESIGN















HR SUPPORT








# Membership Benefits 2016

- ▶ 12 hours 1:1 support 
- ▶ Expanded resource Team 
- ▶ Member helpdesk
- ▶ Member networking events
- ▶ Business planning 
- ▶ Annual CPD hours
- ▶ Online document library
- ▶ Wealthtrack Software discount 
- ▶ Business practice audit 
- ▶ Enhanced earning potential
- ▶ Time management 
- ▶ Member Investment Academy 
- ▶ IT support 
- ▶ Client tax solutions
- ▶ EAP programme 
- ▶ Member referral scheme
- ▶ IBA membership 
- ▶ Voyant training & discount 
- ▶ Member Fuel Card scheme 
- ▶ Residence membership 

## Optional Add Ons

- ▶ Extra hours €100 per hour
- ▶ Client seminars
- ▶ Compliance audit
- ▶ Corporate video
- ▶ Client newsletter
- ▶ Printing 
- ▶ Website design and build
- ▶ Member PI Scheme 
- ▶ Financial Planning service 

All for only

# €199

per firm per month  
plus VAT

# Your Trusted Advisor Group Resource Team

## > Compliance

Fergus Bradley	Compliance Solutions & Training Ltd
Evelyn Hanrahan	Compliance, Governance and Training Ltd
Niall Crowley	Regulatory Compliance Support Services Ltd

## > Technical Support

Tony Gilhewley	Technical Guidance Ltd
Clive Slattery	Clive Slattery Ltd
Pat Ryan	Trusted Advisor Group

## > Tax & Legal Advice

Deirdre Counihan	DC & A Tax
Damian Wilson	Irish Tax Support
J. Kirby Tarrant	O'Gradys Solicitors
Elizabeth Burke	O'Gradys Solicitors

## > HR Support

Andy Whelan	HR Compass
Tommy Smyth	Tom Smyth & Associates

## > Investment Analysis & Research

Gary Connolly	iCubed
Paul McCarville	Clarus Investment Solutions
Joe Mottley	Clarus Investment Solutions

## > Lifestyle & Health

Niamh Fitzpatrick	VHI Corporate Solutions
Andrew Dunne	Personal Health

## > Marketing & PR

Eamonn Twomey	Stepchange Ltd
Maria Cunningham	Superior Marketing
Sharon Bannerton	Bannerton
Peter Fitzgerald	ThirtySix.ie

## > Personal Coaching & Training

Dermot McConkey	Dermot McConkey Development & Training Ltd
Andrew Considine	Inspire to Achieve
Damian Shields	Focus 2 Succeed

## > Business Planning & Strategy

Eamonn Twomey	Stepchange Ltd
Paul Fagan	Business Coaching Ireland
Eunan O'Carroll	Core Consulting
Peter Fitzgerald	ThirtySix.ie

## > Web, Print & Design

Frank O'Donnell	Print Depot
Peter Fitzgerald	ThirtySix.ie
Ian Smith	Big Top Multimedia

## > IT support

Eamon Gallagher	PC Technix
-----------------	------------

## > Voyant Training

Stephen Browne	Voyant
----------------	--------



Trusted Advisor Group,  
Unit 1, 88-89 Furze Road,  
Sandyford Ind. Estate,  
Sandyford, Dublin 18.

☎ +353 1 905 5812

✉ [info@trustedadvisorgroup.ie](mailto:info@trustedadvisorgroup.ie)

💻 [www.trustedadvisorgroup.ie](http://www.trustedadvisorgroup.ie)



**Trusted Advisor  
Group®**

# Trusted Advisor Group Membership Application Form

Please complete this form in **BLACK** ink only.

Name of Business: \_\_\_\_\_

Trading name (if different): \_\_\_\_\_

Address (Business): \_\_\_\_\_

Registered Business Address: \_\_\_\_\_

Tel: \_\_\_\_\_ Website: \_\_\_\_\_

Ltd. Co: ☐ Partnership: ☐ Sole Trader: ☐

How long is the Business established: \_\_\_\_\_

Company Registration Number: \_\_\_\_\_ VAT Registration Number: \_\_\_\_\_

CBI Registered Number: \_\_\_\_\_

CBI Authorisations held by the Business: \_\_\_\_\_

Membership of Professional Bodies or Groups e.g. PIBA/IBA/IMAF etc: \_\_\_\_\_

Have you ever had a CBI inspection? Yes ☐ No ☐

Have you ever had a complaint referred to the F.S.O.? Yes ☐ No ☐

*If yes, please provide details on a separate sheet.*

Name of person proposing membership: \_\_\_\_\_

Role in the Firm: \_\_\_\_\_

Qualifications: \_\_\_\_\_

Address (Home): \_\_\_\_\_

Tel (w): \_\_\_\_\_ Tel (m): \_\_\_\_\_

Email: \_\_\_\_\_

## Details of all Directors/Partners/Shareholders:

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Length of Service: \_\_\_\_\_ Length of Service: \_\_\_\_\_

Qualifications: \_\_\_\_\_ Qualifications: \_\_\_\_\_

Role in the Organisation: \_\_\_\_\_ Role in the Organisation: \_\_\_\_\_

*please supply additional information on a separate sheet of paper*

**Please remember to submit a copy of your current PI policy schedule and  
a current Tax Clearance Certificate with this application form.**

## Declaration:

I declare that the information contained in this form is true and complete and I have disclosed all information which might reasonably be considered relevant to my application to be a member of the Trusted Advisor Group. I undertake to promptly notify the Trusted Advisor Group of any changes in the information which I have provided and will supply any other relevant information of which I become aware at any time after the date of this Declaration.

I confirm that I meet the Continuous Professional Development requirements set out in the Central Bank of Ireland's Minimum Competency Requirements and/or for any professional qualification I hold.

### I hereby authorise

- All educational establishments, professional associations, accreditation bodies and former employers
- All credit and reference agencies
- All providers
- The Central Bank of Ireland

to release any information which they may have about me to the Trusted Advisor Group and I release them from any liability or responsibility from doing so.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

On behalf of the Intermediary Firm

## Request for a Standing Order

To: The Manager, \_\_\_\_\_

(Insert bank name and address)

You are authorised to set up a Standing Order on my/our account as specified below. My/Our account will at all times contain sufficient funds to enable each payment to be effected on the due date. **I understand that if three consecutive payments are not made due to insufficient funds the Bank may cancel this standing order without further reference to me.**

### Customer Details

NAME: \_\_\_\_\_

IBAN:

BIC:

Please complete and submit at least 5 working days before commencement of first payment date.

### NEW Standing Order (From above Current Account)

BENEFICIARY NAME: **TAG Financial** \_\_\_\_\_

IBAN:

BIC:



REFERENCE: \_\_\_\_\_ FREQUENCY: \_\_\_\_\_

START DATE:  AMOUNT:  .

AMOUNT IN WORDS: \_\_\_\_\_

CUSTOMER'S SIGNATURE: \_\_\_\_\_ Date: \_\_\_\_\_