



**Informed
Decisions**

What to expect on your Initial Call

**By Paddy Delaney,
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Founder of Informed Decisions

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What the Advisor Will Do

Introduce the Firm:

Provide an overview of Informed Decision's philosophy and approach to financial advice

Gather Information:

Paddy will ask about your current financial situation, including income, expenses, assets, debts, and investments.

Assess Your Goals:

We will discuss your short-term and long-term financial goals, such as retirement and investment planning.

Discuss Fees and Services:

Paddy will explain Informed Decisions fee structure and the types of services offered, including financial planning, investment management, and the MasterPlan

Next Steps:

Paddy will explain the next steps in the MasterPlan process for you to think about when deciding if you would like to proceed.

How you can prepare

Be Prepared to Discuss Your Financial Situation

Prepare to discuss your current financial situation such as current pension and investment values.

Think About Your Goals:

Reflect on your financial goals and what you hope to achieve in the future.

Ask Questions:

Don't hesitate to ask questions about the Informed Decision's Team, costs, steps and service. Ask about Informed Decision's approach and style to see if they align with your needs and preferences.



Paddy Delaney

Qualified Financial Advisor | Qualified Retirement Planning Advisor |
Qualified Executive Coach

Thanks for reading, I really do hope it was of some value to you.

If you would like to get in touch about any aspect of this please [drop me a mail here](mailto:help@informeddecisions.ie).

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