Private Client Services

Protecting your financial future

Why Grant Thornton?

Grant Thornton's Private Client Services team can advise you on all areas of financial, pension, investment, succession and inheritance planning. We understand that each individual's circumstances are different to the next and we tailor our services to suit your specific needs.

Our team has a wide variety of expertise, consisting of certified financial planners, financial advisers, chartered accountants and tax advisers.

We believe no two clients should receive the same generic, 'one size fits all' advice, whether it is investing, provision for retirement or inheritance planning. In order to provide proper tangible advice, we will create a long term financial plan for you and your family, demonstrating how to optimise your wealth and manage it to best meet your needs.

Nobody can give you the best advice without truly understanding what is important to you and what you are trying to achieve.

We offer a genuine collaborative approach and want to build a close working relationship with you, ensuring a consistent service delivery that is flexible. Our commitment to the client experience is at the heart of everything we do.

By utilising the expertise of multi disciplined individuals, we look to bring innovative and insightful solutions to you which are pragmatic and best suit your particular requirements.

Grant Thornton has been the fastest growing professional services firm in Ireland over the past decade. This growth hinges on the open and trusted relationships we develop with our clients and the ability of our carefully selected teams to work cohesively to add value for our clients.

Additionally, with our unique insight and experience in our taxation, audit and corporate finance areas, Grant Thornton can support you in dealing with challenges and change faced by high net worth individuals and business owners.

We want to be your trusted Private Client advisor and work with you in the structuring, implementation and on-going management of your specific plan.

Our services

Grant Thornton Financial Counselling
Our team specialise in financial planning advice for self-employed individuals, company directors, multinational executives and retirees. Offering independent financial advice to individuals and corporates across a range of areas including savings, investments, pension planning, advise on company pension schemes, retirement planning for senior executives and directors, shareholder insurance, partnership insurance and corporate investment portfolio planning.

Succession planning
Our experts have extensive experience guiding our clients successfully through the succession process. This involves advice on both the qualitative and quantitative aspects of the process. While there is a business at the core of each succession plan we advise on, it is all predicated on understanding the people and their respective wishes.

Personal tax compliance and planning
We offer comprehensive personal tax advice, meeting the growing complexity of personal tax affairs. Our team help clients remain compliant and up to date with all of their tax obligations, while ensuring that they are solutions driven in the most tax efficient way possible. Our clients gain access to the expertise and experience of staff and partners across the entire firm.

Inheritance planning
We help you discuss your "wealth" in a meaningful way to ensure that possible significant tax liabilities are mitigated. We ensure the tax-efficient passing of family wealth focusing on timing, use of thresholds, trust(s) and the small gift exemption.

Key contacts for our personal financial planning team include:

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