OUR INVESTMENT ADVICE PROCESS

At Investment Intelligence we have developed a unique and disciplined investment advice process which is designed to control investment risk and optimise investment returns while being flexible and easy to understand. We believe we deliver a 'Best in Class' service with transparent fees and charges.



Step 4 Review

- Produce regular review report
- Meet with you to discuss
- Incorporate changes in your lifestyle/financial goals to your portfolio
- Execute fund switches to adjust/ rebalance risk and asset class mix
- Suggest tactical switches at appropriate points in the market cycle



Step 1 Understand

- Understand your investment goals
- Assess your risk tolerance
- Assess your capacity for losses
- Understand your investment preferences and income requirements
- Agree investment objectives & constraints with you



- Discuss recommendation / review schedule with you
- Discuss portfolio characteristics
- Adjust and agree as necessary
- Complete documentation
- Implement agreed strategy





- Analyse suitable products/funds for you
- Formulate a client plan against your objectives & constraints
- Agree portfolio target asset class mix with you
- Build a portfolio for you using suitable funds
- Produce written recommendation report / review schedule



We can advise on portfolios that maintain European Securities and Markets Authority (ESMA) risk ratings or we can design a personalised portfolio to match your own risk / return preferences.





Dave Gahan B.Sc. M.Sc. ASIAI Investment Intelligence, INVENT Building, Dublin City University, Dublin 9 Tel: 7007550 Tel: 7007553 – (direct line) Email: davegahan@investmentintelligence.ie www.investmentintelligence.ie