



WHO ARE INVESTMENT INTELLIGENCE

Investment Intelligence was founded in 2002 by Dave Gahan to care for clients both individual and corporate, who are seeking clear, open and honest advice in relation to their pension and investment matters.

By specialising in all aspects of lump-sum investing, pension planning and post-retirement wealth management, we deliver expert, disciplined and unbiased investment guidance on a private one-to-one basis. We work exclusively for you and have no vested interest in the investments we recommend.

Whether you are investing a large capital sum or saving a regular monthly contribution through a pension, we provide the same level of care and follow the same disciplined advice process with every Client.

- Wealth Management
- Long Term Financial Planning
- Pre-Retirement Saving (Pensions)
- Post Retirement Fund Management
- Lump Sum Investing
- Personal & Business Protection

OUR CLIENT SERVICE PROMISE

At Investment Intelligence client care is our highest priority and that is why we promise to:

- Develop a supportive and trusting relationship with you
- Follow a disciplined investment process based on a clearly defined investment philosophy to achieve your investment goals
- Conduct in-depth research into products and funds
- Discover your investment objectives, requirements and constraints
- Employ effective 'risk control' techniques for you
- Document all recommendations and advice
- Provide a continuous review service to manage all your investments within the parameters agreed
- Provide regular updates and communications
- Answer all your queries and provide necessary assistance all year round

"We work for you"



INVESTMENT INTELLIGENCE SERVICES

Pensions and Investment Management

At Investment Intelligence, our core service is providing you with effective Pensions and Investment Advice using ongoing Risk Control techniques.

We recognise that not all Investors have the same investment needs and preferences so we offer three different service levels, "Practical", "Personalised" and "Personalised Plus".

Protection Products

We also offer services on Business and Personal Protection Products (Life Assurance, Income Protection etc) because these products often complement long-term planning goals and can help to reduce financial risk exposure.

Lifelong Financial Planning

We can provide a Lifelong Financial Planning service to help you map out your financial and lifestyle objectives. We work with you and if required, with your Accountant / Tax Consultant, to design and implement plans to meet your long-term objectives.

"Our core service is the provision of effective pensions and investment advice supporting ongoing portfolio management using risk control techniques."



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ADVANTAGES OF INVESTMENT INTELLIGENCE

- An Investment Specialist sitting on your side of the table
- Clear and transparent fee structure
- A careful approach to choosing investments
- Bespoke portfolio unique to each client
- Unbiased Research & Analysis
- Can incorporate existing investment into single diversified portfolio
- Specialists in diversification and control of investment risk
- Focus on reducing costs
- A client advisor – not a product seller
- Regular reviews and risk assessment

Important Notice: MDG Investment Solutions Limited trading as Investment Intelligence is regulated by the Central Bank of Ireland