

EXPERT TAX ADVICE NOW
AVAILABLE TO TRUE WEALTH CLIENTS

SIMPLIFY TAX MAXIMISE WEALTH

Brown & Lombard
LIMITED

TRUE
WEALTH

DISCLAIMER

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This document outlines the key details of our partnership with Brown & Lombard. It highlights the tax advisory services now available to True Wealth clients and how they can complement your overall financial strategy. We encourage you to review this document carefully, as it may help you make more informed decisions and ensure you're fully supported across both your financial and tax planning needs.

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ENHANCING YOUR FINANCIAL FUTURE THROUGH EXPERT TAX PARTNERSHIP

At **True Wealth**, we believe that exceptional financial advice must go hand in hand with strategic tax planning. That's why we've partnered with **Brown & Lombard** to offer our clients access to expert, tailored tax advice that can unlock greater efficiency, long-term savings, and smarter financial outcomes.

HOW BROWN & LOMBARD CAN HELP YOU

✓ Simplifying Complexity

They make complex tax and compliance matters easy to understand and manage.

✓ Strategic Planning

Whether you're growing your business, planning for retirement, or preparing for a sale, they'll ensure your structure is tax-efficient.

✓ Specialist Services

For individuals, professionals, and business owners:



PERSONAL AND CORPORATE
TAX COMPLIANCE



BUSINESS SUCCESSION &
SALE PLANNING



INTERNATIONAL AND DOMESTIC
TAX CONSULTANCY



EMPLOYEE SHARE SCHEME
STRUCTURING



PAYE/PRSI ADVICE FOR
EMPLOYERS



FULL SUPPORT FOR PROFESSIONAL
SERVICE COMPANIES

WHO IS THIS FOR?



BUSINESS OWNERS & COMPANY DIRECTORS

Gain expert support on structuring your business, planning for succession, or preparing for sale — all with tax efficiency at the core.



PROFESSIONAL FIRMS (ACCOUNTANTS, SOLICITORS, CONSULTANTS)

Access strategic advice tailored to service-based businesses, including corporate structuring, share schemes, and compliance.



INDIVIDUALS SEEKING TAX-EFFICIENT WEALTH STRATEGIES

Make smarter financial decisions with guidance that helps you protect and grow personal wealth in a tax-efficient way.



EMPLOYERS LOOKING TO OPTIMISE STAFF BENEFITS

Navigate PAYE, PRSI, and employee incentive schemes with confidence and compliance — helping you attract and retain top talent.

To read more about their services: <https://brownlombard.ie/services/>

WHY BROWN & LOMBARD?

Brown & Lombard is a leading independent tax advisory firm based in Dublin, with a strong reputation for providing intelligent, tailored solutions to Irish individuals and businesses. Founded in 2012 by Cormac Brown, a Chartered Tax Adviser and Certified Accountant with over 30 years of experience in Big 4 firms and top law practices, the firm combines deep technical expertise with a personal, partner-led approach.



They understand that no two clients are the same. That's why their advice is never one-size-fits-all. Brown & Lombard work closely with each client to understand their unique circumstances and long-term goals, delivering tax strategies that are not only compliant but forward-thinking and financially advantageous.

Their experience with privately owned businesses, professional firms, and high-value individual clients means they know exactly how to navigate the overlaps between personal wealth, business structures, and evolving tax regulations. Whether you're planning for succession, sale, or simply better efficiency, their guidance is built to help you make confident, informed decisions that stand the test of time.

With Brown & Lombard, True Wealth clients now have access to the kind of tax insight and strategic thinking that can truly shape a stronger financial future.

Brown & Lombard
LIMITED

READY TO TAKE THE NEXT STEP?

This partnership between True Wealth and Brown & Lombard brings together financial planning and expert tax strategy, giving you access to a truly **holistic approach to managing, protecting, and growing your wealth.**

Whether you're a business owner, a professional, or simply looking to get more from your financial planning, this is your opportunity to benefit from tailored, expert tax guidance that could make a real difference to your long-term success.

Chat with your True Wealth advisor to see how this partnership could bring real value to your financial plans — and help you get even more from your money.

Want to know more about what Brown & Lombard can do for you? Take a closer look at their expert services and see how they make tax advice simple, smart, and tailored to you.

THE RIGHT TAX STRATEGY DOESN'T JUST SAVE
YOU MONEY — IT SHAPES YOUR FUTURE.
LET'S BUILD IT TOGETHER.

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