

# CONSULTANCY SERVICES



## CONSULTANCY SERVICES

Platinum Pensioneer Trustees offers a range of consultancy services to intermediaries and their clients, our experience and unique skill set allow us to provide a wide range of services to pension scheme professionals and clients alike.

### Professional advisors

- Structuring investment product to ensure compliance with Revenue pension and legislative requirements
- Advising on re-structuring of syndicated investments
- Providing an on-going technical support and advice function for advisors

### Pension scheme clients

- Advising the self employed of the pension benefits and the steps involved in incorporating their business
- Re-negotiating pension scheme loans with financial institutions
- Dealing with the Revenue Commissioners and Pensions Board on behalf of clients regarding specific issues arising

### Pension scheme trustees

- Advising and assisting pension scheme trustees on meeting their fiduciary and legislative obligations and responsibilities through our dedicated trustee service and trustee training facility
- Chairing trustee meetings or sitting on trustee subcommittees
- Advising scheme trustees on an ad-hoc basis
- Acting as a mediator in dispute cases between scheme members and trustees

### Actuarial Services

- Providing advice around the structure and obligations under DB arrangements
- Advice on the winding up of DB arrangements
- Other Actuarial Services include - Executive Remuneration Planning, Financial Projections, Loss of Earnings Calculations and Expert Witness Services

### Unit Trust Services

- Offering an exempt unit trust structure to syndicate pension investments

### Pension Adjustment Orders

- Advising on the drafting and implications of Pension Adjustment Orders

The principles of Platinum Pensioneer Trustees Ltd are

#### Paul Murray



Paul is an accountant and tax consultant; he holds a diploma in pensions from the Life Insurance Association (LIA) and a diploma in Trust and Estate Management from the Law Society. Paul is also a Revenue approved Pensioneer Trustee.

Paul has held a number of senior management roles in his 15 plus years in the pensions industry, he is co-author of the Irish Taxation Institutes book 'Pensions: Revenue Law and Practice' and has written and lectured extensively in all areas of pensions.

#### Brendan Nordon



Brendan is a qualified actuary, he holds a degree in Actuarial Mathematics and Statistics and is a Revenue approved Pensioneer Trustee.

Brendan has over 10 years experience in the pensions industry working on Defined Benefit and Defined Contribution plans in both the UK and Ireland. He regularly lectures on the issues impacting Pensions Schemes in Ireland.

More information is available about these and the other services we offer at [www.platinumpt.ie](http://www.platinumpt.ie), alternatively we can be contacted by email at [info@platinumpt.ie](mailto:info@platinumpt.ie) or by phone at T: 01- 661 8266 or 042-935 2140

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