

Merrion's Pension Portfolio

In response to increasing demand for flexibility, transparency and investment control within pre retirement pension products, Merrion has introduced their Pension Portfolio for Company Directors, Key Employees and the Self-Employed. Merrion's Pension Portfolio is very attractive for investors who wish to diversify their pension assets to include direct equity holdings, government gilts, corporate bonds and property. Apart from building the Portfolio through new contributions, it is also possible to transfer existing pension fund assets into the structure. Merrion has special arrangements in place with a number of Ireland's leading insurance companies to facilitate the creation of these Portfolios.

Merrion's Pension Portfolio can hold

- Shares
- Government gilts
- Corporate bonds
- Cash
- Direct property / property funds
- Unit and investment trusts
- Merrion's guaranteed structured products
- Insurance company funds

NB: This list is not exhaustive

Merrion's Pension Portfolio: Key Points

- Control and ownership of pension assets by the individual
- Flexible and efficient way to invest your pension monies
- Facilitates greater investment choice and access to direct equities
- Charging structure is visible and competitive
- Benefits of dealing directly with a stockbroker i.e. access to Merrion's account managers and equity research capability

Fees & Charges

Insurance company's annual administration fee	1 %
Dealing charges on shares	Please refer to Merrion's schedule of fees

Minimum regular contribution is €20,000.00 per annum

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