Mike Shannon CFP

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Senior Financial Planner - Imperius Wealth

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I am passionate about delivering impactful advice to families and individuals across Ireland & the EU. During my 20+ years' in the cross-border financial planning industry (USA, EU & Ireland), I have learned from incredible, client focused technicians within globally recognised banks, insurance companies and investment firms. I want my clients to benefit from this technical knowledge to ensure they get the best results with the money they have worked so hard for. I have reached the highest educational levels for the financial planning industry through countless evenings of lectures, study and exams. I have been awarded the globally prestigious CFP designation & Post Graduate Diploma in Financial Planning from University College Dublin. I bring a healthy mix of experience and formal qualifications in the area to really make a difference to clients from an investment, pension and estate planning perspective.

In live in Carrickmines, Dublin 18 with my wife and 3 children and enjoy playing tennis, squash, hurling, watching rugby in DLSP RFC & occasionally in Lansdowne Road.

Professional Qualifications	
USA	• FINRA: Series 7, 6 & 63 Investment & Financial Planning licences
Ireland	• Certified Financial Planner • Graduate Diploma (Hons) in Financial Planning (UCD) ○ Specialist Investment Adviser ○ Retirement Planning (Advanced) ○ Tax & Estate Planning ○ Personal & Business Risk/Protection ○ Principles and Ethics of Personal Financial Planning ○ Integrated Personal Planning • Professional Diploma in Financial Planning, Qualified Financial Adviser (QFA), LIA • MA from Trinity College Dublin • Advanced Diploma in Business Management (TUD/DIT)
EU	• ACI Treasury Dealing Certificate

Specialities:

- Pension Consolidation (Irish & UK)
- Retirement Planning and tax reduction for clients 50+ years old
- Estate/Inheritance Tax Planning & Capital Acquisition Tax
- Financial Planning - Life Products - Investment Life Insurance Products
- Life Risk Insurance Products
- Trauma and Income Protection Insurance
- Portfolio Management
- European Retirement Strategies & Tax planning (UK, Spain, France & Portugal)

- Irish & British expats tax mitigation

Mike Shannon – Senior Financial Planner