

**Seminar:** ITI/STEP Joint Seminar - Wills, Trusts and Family Structures: Getting the basics right

**Sponsored by Davy**

**Speakers:** Lisa Cantillon (Kennelly Tax Advisers), Carol Hogan (O'Connell Brennan), Anne Stephenson (Stephenson Solicitors) & Muriel Walls (Walls & Toomey)

**Date:** Thursday, 28 February 2019

**Time:** 08.30 – 12.00

**Duration:** 3.5 hours

**Location:** Hilton Hotel, Charlemont Place, Dublin 2 and Online

**Price:** €135

**Online Price:** €115

Time	Topic
08.15 – 08.30	<b>Registration</b>
08.30 – 09.45	<b>Part 1 – Understanding the structures used in estate planning and their impact in family law matters</b> <b>(Carol Hogan, O'Connell Brennan and Muriel Walls, Walls &amp; Toomey)</b> <ul style="list-style-type: none"><li>• Wills</li><li>• Trusts</li><li>• Powers of attorney</li><li>• Letter of wishes</li><li>• Shareholders agreements and family constitutions</li><li>• Pre-nuptial agreements</li></ul>
09.45 – 10.30	<b>Part 2 – Topical CAT issues and Will and Trust deeds - getting the fundamentals right</b> <b>(Lisa Cantillon, Kennelly Tax Advisers)</b> <ul style="list-style-type: none"><li>• Wills &amp; Trusts – getting the basics right</li><li>• Will Planning</li><li>• Recent gift and inheritance tax scenarios</li><li>• Topical CAT matters</li><li>• Foreign aspects</li></ul>
10.30 – 10.45	<b>Tea/Coffee Break</b>
10.45 – 11.35	<b>Part 3 – Disclaimers</b> <b>(Anne Stephenson, Stephenson Solicitors)</b> <ul style="list-style-type: none"><li>• Testate and Intestate Disclaimers- legal and tax effect</li><li>• Effect on right to extract the grant</li><li>• Settlements and disclaimers: absolute and remainder interests</li><li>• Joint Tenancies and Disclaimers</li><li>• Tax effect of Disclaimers for consideration</li><li>• Points to consider in evaluating the possible benefits of a disclaimer</li><li>• Precedents</li></ul>
11.35 – 12.00	<b>Panel Discussion and Questions &amp; Answers Session</b>

## Speakers

**Lisa Cantillon** is a Director with Kennelly Tax Advisers Limited. Lisa is a Chartered Tax Adviser (CTA) and the co-author of the Irish Tax Institute publication Practical Income Tax - The Professional's Guide. Lisa has particular expertise in employment-related tax issues, including issues faced by mobile workers and also specialises in estate tax planning for gift and inheritance tax for high net worth individuals and their families. Lisa is a contributor to the Chartered Tax Adviser (CTA) education programme and lectures and speaks extensively.

**Carol Hogan** is a Partner with O'Connell Brennan Solicitors, a boutique private client legal firm. Carol provides specialist legal and taxation advice to a broad range of private clients, particularly in relation to trust, estate, succession and transfer and management of asset matters. She is a Solicitor, Chartered Accountant (FCA), Chartered Tax Adviser (CTA) and a member of the Society of Trusts and Estates Practitioners (STEP) Ireland. She is a regular speaker and lecturer in her area of expertise, contributes to industry publications and is a member of the editorial board of the *Irish Tax Review*.

**Anne Stephenson** is a member of the Society of Trusts and Estates Practitioners (STEP) Ireland, the Probate Committee of the Dublin Solicitors Bar Association, the Probate Administration and Trusts Committee of the Law Society of Ireland, the Probate Liaison Committee (made up of representatives of the profession and of the Court Service involved with the Probate process) and Vice-Chairperson of the Committee of the Solicitors for the Elderly. Anne has practiced, and taught law for more than 25 years and is a member of the associate faculty and external examiner at the Law School at the Law Society of Ireland. She lectures and examines on the STEP Diploma in Wills Trust & Estate Planning, and on the Law Society's Continuing Legal Education Courses, and to the DSBA and numerous other professional bodies. She is the co-author of the Oxford University Press (OUP) Manual on "Wills Probate and Estates" 6th Edition, the OUP Manual on "Conveyancing", 8th Edition and the OUP Manual on "Capital Taxation" 2nd edition. She is a contributor to *Laffoy Irish Conveyancing Precedents*, in particular, the section on executors and administrator.

**Muriel Walls** is a Partner in Walls & Toomey and has specialised in family law for over thirty years and was formerly a Partner with McCann FitzGerald. She has been involved in many leading cases and is a recognised expert. She has written and lectured extensively and is a member of many national and international family law and campaigning organisations. Muriel is a CEDR accredited mediator and a family mediator and collaborative practitioner. Muriel was Chair of the Legal Aid Board for five years and formerly was a board member of the Family Support Agency for nine years.