



Educating and Developing
Financial Professionals



Managing Wealth in 2019 & Beyond



DATES AND VENUES:

Galway:	Clayton Hotel
Date:	Tuesday 11 June 2019
Cork:	Maryborough Hotel
Date:	Wednesday 12 June 2019
Dublin:	The Gibson Hotel & Online
Date:	Thursday 13 June 2019
Time:	08.00 - 11.30
Price:	€100
Attend online:	€85

3 HOURS CPD



Time	Topic	Speaker
07.45 - 08.00	Registration	
08.00 - 08.10	Opening Remarks	
Paul Grimes, Chairperson, Grimes International		
08.10 - 09.00	Current Tax and Legal Issues for Diverse Family Circumstances <ul style="list-style-type: none"> • Tax implications of relationship breakdown • Managing sibling and other family relationships • Practical tips and traps for advisers 	Amanda-Jayne Comyn, <i>Philip Lee</i>
09.00 - 09.50	How Pension Adjustment Orders (PAOs) can go Wrong <ul style="list-style-type: none"> • How PAOs work by splitting up retirement benefits • Practical examples/case studies of how PAOs can go wrong or give unexpected results • Some do's and don'ts when advising clients on PAOs 	Tony Gilhawley, <i>Technical Guidance Ltd</i>
09.50 - 10.15	Tea/Coffee & Networking	
10.15 - 11.05	Managing Wealth in Cooling Markets - Investing for the 'Late Cycle' <ul style="list-style-type: none"> • Review of the key factors driving current market valuations • What are the large investment "icebergs" that will shape world markets in the next 10 years • How to adapt client portfolios to reflect market developments with thoughts on different approaches based on stage of life • The Irish economic outlook in the 'post' (?) Brexit environment 	Kevin McConnell, <i>Gem Strategic</i>
11.05 - 11.30	Closing Remarks	

Each technical presentation will be followed by a discussion between the Speaker and Chair, Paul Grimes, to draw out the specific learning points and complexities.

www.taxinstitute.ie
01 6631700

Speakers

Amanda Jayne Comyn, BL, is a Partner and Head of Tax with Philip Lee. She advises the firm's clients on the commercial and tax aspects of M&As, reorganisations and restructurings, estate and retirement planning, trusts, insolvency and all aspects of property transactions with specialized experience in stamp duty and stamp duty planning. Amanda-Jayne is also a Chartered Tax Adviser (CTA) and a TEP. She is author of *Personal Insolvency Law, Taxation in Ireland and Irish Stamp Duty Law* (Bloomsbury Professional). She is editor of the Irish Tax Institute's publication *Corporate Transactions: Tax and Legal Issues*.

Tony Gilhawley is the founder and Principal of Technical Guidance Ltd which provides technical, educational and compliance consultancy services to providers in the life assurance and pensions industry. He has had a long involvement with various education institutes in developing Irish based educational courses for the various areas within the financial services industry. Tony is an Actuary with over 40 years' broad experience in the life assurance and pension industries. Tony is also an honorary Life Member of LIA.

Paul Grimes (Chair) CFP, is the Principal of Grimes International and CEO of Financial Planning Standards Board Ireland DAC. In his more than 25 years of experience in the financial services arena, he has worked with institutions and clients in Australia, Europe, the Middle East, Africa, Asia and the U.S. Paul lectures in financial planning at a post-graduate level and has been featured in a number of professional publications. He is the current chairperson of FPSB's European Forum.

Kevin McConnell is Chief Executive of Gem Strategic, a specialist consultancy to financial institutions. Over a career spanning 25 years in capital markets, Kevin has worked as a strategic adviser to a range of domestic and global international institutions in the investment and banking industry, advising on capital, risk and strategy. He advises both European and US financial institutions developing and testing capital resilience across ranges of economic and capital market scenarios/outcomes. Kevin sits on the investment committee of a number of financial institutions, in an active oversight role in investment strategy. He is a member of the Advisory Committee of the Certified Investment Fund Director Institute and is a Senior Associate of Faculty, Institute of Banking Executive Education. Kevin is a Teaching Fellow in Wealth Management on the Masters in Finance, Trinity College Dublin and lecturers on Bank Capital in Cambridge University.

Booking Form

**Irish Tax
Institute**

MANAGING WEALTH IN 2018 & BEYOND

Tuesday 11 June 2019 Clayton Hotel, Galway	<input type="checkbox"/>	€100
Wednesday 12 June 2019 Maryborough Hotel, Cork	<input type="checkbox"/>	€100
Thursday 13 June 2019 The Gibson Hotel, Dublin & Online	<input type="checkbox"/>	€100
TOTAL		€

I wish to reserve ___ places in the name of:

Member No.:

First Name:

Surname:

First Name:

Surname:

Firm/Company:

Address:

Tel:

Email:

Please indicate your preferred payment method (tick only one)

Cheque: Please make cheques payable to "Irish Tax Institute"

Credit/Debit Card: I wish to pay by credit/debit card

Card Type: MasterCard Visa AmEx Visa Debit

Card No.:

Card Holder:

Billing Address:

Expiry Date:

Total Price: €

Signature:

Date:

Please return this form with payment to:

Irish Tax Institute
South Block, Longboat Quay,
Grand Canal Harbour,
Dublin 2

Refund Policy: Full refund for written cancellations received up to five working days prior to the event, but no refund thereafter. An alternative attendee can be nominated at any time up to and including the day of the event. There is no credit allowed for non-attendance.

Data Protection: The Irish Tax Institute takes your privacy seriously and will only use your personal data to process your order. We will process your personal data in accordance with our privacy policy as available on our website. If you want a copy, you can write to us at dataprivacy@taxinstitute.ie From time to time, we would like to contact you about other products/services we provide which we believe you will also be interested in. If you consent to us contacting you for this purpose, please tick . Note: You will be able to unsubscribe at any time from our emails by following the link in our emails.

For more information or to book your place

Visit www.taxinstitute.ie

Email cpd@taxinstitute.ie

Tel 01 6631700