



Managing Wealth in 2020 and Beyond

Joint Irish Tax Institute, LIA and FPSB Seminar



Educating and Developing
Financial Professionals



FINANCIAL PLANNING STANDARDS BOARD

Time	Topic	Speaker
08.30 - 08.32	Opening Remarks	Paul Grimes, <i>FPSB</i>
Paul Grimes, Chairperson, FPSB		
08.32 - 09.02	Self-Administered Pension Arrangements <ul style="list-style-type: none"> The different types of non-insurance pension arrangements How they differ from life company pension arrangements Comparison of life company and self-administered pension arrangements: <ul style="list-style-type: none"> Authorization required to advise clients Different conduct of business when advising clients Client protection 	Tony Gilhawley, <i>Technical Guidance Ltd</i>
09.02 – 9.17	Q&A with Tony Gilhawley and Paul Grimes	
09.17 – 9.47	Trusts in the Context of Vulnerable People including: <ul style="list-style-type: none"> People with special needs Improvident beneficiaries Young children 	Aileen Keogan, <i>Aileen Keogan Solicitor & Tax Consultant</i>
09.47 – 10.02	Q&A with Aileen Keogan and Paul Grimes	
10.02 - 10.32	Investing in Recessionary Times <ul style="list-style-type: none"> Overview of the current macro-economic environment and trends Asset valuations in the current environment and wealth preservation strategies Are there investment opportunities to be had in the current environment? 	Kevin McConnell, <i>Gem Strategic</i>
10.32 – 10.47	Q&A with Kevin McConnell and Paul Grimes	
10.47 – 11.13	Plenary Q&A with all speakers and Paul Grimes	
11.13 – 11.15	Closing Remarks	

Biographies



Aileen Keogan is the Principal of Aileen Keogan Solicitor & Tax Consultant, a solicitor, Chartered Tax Adviser (CTA) and TEP (STEP member). Her practice focuses on Wills, trusts and estate planning for individuals and businesses, including as consultant to solicitors and accountants. Aileen has written and lectured extensively in the area of trusts and succession planning, including her co-authorship of *The Law & Taxation of Trusts* (Keogan, Mee and Wylie, Tottels 2007), the Will precedents in *Laffoy's Irish Conveyancing Precedents* (Bloomsbury annual) and as editor of the CAT aspects of the annual Irish Tax Institute's publication the *Law of Capital Acquisitions Tax, Stamp Duty and Local*

Property Tax. Aileen is a Council Member of the Irish Tax Institute, is a member of the Law Society's Probate, Administration and Trusts Committee, their representative at TALC Capital and Direct Taxes and is a member of the STEP Ireland committee and their representative at STEP Europe.



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.



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.