

Seminar: Estate Planning in 2021
ITI and STEP Ireland Joint Webinar
Date: Thursday, 11 March 2021
Time: 10.30 – 12.30
Duration: 2 hours
Price: €55

Programme

Time	Topic	Speakers
10.30 – 10.35	Introduction	Tina Quealy, <i>O'Connell Brennan</i>
10.35 – 11.05	Tax Implications of Estate Planning – a case study approach <ul style="list-style-type: none"> Managing the tax position and timing on the transfer of family assets Tax reliefs in the estate planning context Tax issues regarding estate assets in other jurisdictions Impact of domicile in estate planning 	Brian Broderick, <i>O'Hanlon Tax Limited</i>
11.05 – 11.35	Estate Planning: The Transfer of Personal Wealth – a case study approach <ul style="list-style-type: none"> Passing on wealth in life and death Overview of the different structures available to use to transfer investment wealth (trusts/limited partnerships/use of small gift exemption and loan funding) Providing for vulnerable family members using trust structures Philanthropy – how the family can give (establishing private foundations) Identifying the core legal documents for estate planning – the importance of having a Will and Enduring Power of Attorney 	Lydia McCormack, <i>Matheson</i>
11.35 – 12.05	The UK Perspective	Patrick Harney, <i>Mishcon de Reya</i>
12.05 – 12.30	Panel Discussion and Questions & Answers	Chair: Tina Quealy, <i>O'Connell Brennan</i> Lydia McCormack, <i>Matheson</i> Patrick Harney, <i>Mishcon de Reya</i> Brian Broderick, <i>O'Hanlon Tax Ltd</i>