Managing Wealth in 2021 and Beyond

Joint Irish Tax Institute, LIA and FPSB Webinar

Time	Topic	Speaker
08.30 - 08.32	**Opening Remarks**	Paul Grimes, *FPSB*
Paul Grimes, Chairperson, *FPSB*		
08.32 - 09.02	**IORP II, What is it Good For?** • An overview of IORP II, the new EU pension regulation • How will it affect your role? • Can principles in the IORP can lead to better outcomes for your clients?	Roma Burke, *Lane Clark & Peacock LLP*
09.02 – 9.17	**Q&A** with Roma Burke and Paul Grimes	

09.17 – 9.47	**Topical Private Client and Family Business Taxation**
	• Pitfalls and opportunities for an efficient inheritance of a private business
	• The impact of anti-avoidance measures in 2021:
	    ○ commercial aspects
	    ○ deal value of buying/selling a private business
	• Using a private business as a family investment platform
		David Keary,
		PwC

09.47 – 10.02	**Q&A** with David Keary and Paul Grimes	
10.02 - 10.32	**Investing in Recessionary Times** • 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, *Gem Strategic*
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

Roma Burke is a Partner and Consulting Actuary with Lane Clark & Peacock LLP. She is a member of the Pensions Commission set up to examine issues in respect of the State Pension arrangements and a member of the Pensions Council set up to advise the Minister on pension matters. Roma is the past Chair of the Society of Actuaries in Ireland Pensions Committee (2016-2018) and Council Member of the Society (2016-2019). Roma is also the past Chair of the Dublin Simon Community Audit & Risk Committee and is an Independent Non-Executive Director on their Board.

David Keary has been a tax director in PwC's Entrepreneurial & Private Business group since 2017. Prior to this he worked in another large professional services firm specialising in corporate tax advisory, private clients and transaction taxes for over 10 years and was also a practising barrister at the Law Library. His areas of expertise include pre-sale corporate restructuring, M&A transactions, informal cross-border debt restructuring, planning for high net worth individuals and large corporates. David is a Chartered Tax Adviser (CTA), a qualified barrister and a member of The Society of Trust and Estate Practitioners (STEP) Ireland.

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.