



# Family Estate Planning and Administration of Estates

Joint ITI and STEP Ireland webinar | 1 MARCH 2022



**Webinar:** Family Estate Planning and Administration of Estates  
**ITI and STEP Ireland Joint Webinar (via zoom)**

**Date:** Tuesday 1 March 2022

**Time:** 10.30 – 12.30

**CPD:** 2 hours

**Speakers:** Owen Burke, *Hayes Solicitors*, Finola O’Hanlon, *O’Hanlon Tax Ltd*  
 & Úna Ryan, *Grant Thornton*



**Programme**

Time	Topic	Speakers
10.30 – 10.35	Introduction	Chair: Sandra Meade, <i>STEP Ireland</i>
10.35 – 11.20	<b>Family Estate Planning – A Case Study Approach</b> <ul style="list-style-type: none"> <li>Family Arrangements – the options from a tax &amp; legal perspective</li> <li>Breakdown of relationships – tax and legal considerations</li> <li>Non-Irish assets – tax and legal considerations</li> </ul>	Úna Ryan, <i>Grant Thornton</i>
11.20 – 11.25	<b>Q&amp;A</b>	Chair: Sandra Meade, <i>STEP Ireland</i> Úna Ryan, <i>Grant Thornton</i>
11.25 – 11.30	<b>Address by Davy</b>	Davy Speaker, <i>Event Sponsor</i>
11.30 – 11.35	<b>Stretch Break</b>	
11.35 – 11.55	<b>eProbate</b> <ul style="list-style-type: none"> <li>Recap of the new Statement of Affairs (Probate) Form SA.2</li> <li>Overview of practical issues pertaining to the process</li> </ul>	Owen Burke, <i>Hayes Solicitors</i>
11.55 – 12.25	<b>Administration of estates</b> <ul style="list-style-type: none"> <li>Income Tax pre &amp; post death</li> <li>CGT and CAT Issues</li> <li>Cessation of trade</li> <li>Beneficiaries’ income tax &amp; CAT</li> <li>Importance of “valuation date”</li> <li>Issues to be aware of and Revenue developments</li> </ul>	Finola O’Hanlon, <i>O’Hanlon Tax Ltd</i>
12.25 – 12.30	Q&A session	Chair: Sandra Meade, <i>STEP Ireland</i> Owen Burke, <i>Hayes Solicitors</i> and Finola O’Hanlon, <i>O’Hanlon Tax Ltd</i>



## Family Estate Planning and Administration of Estates

Joint ITI and STEP Ireland webinar | 1 MARCH 2022



### Speakers

**Owen Burke** is a Senior Associate Solicitor, Trust and Estate Practitioner and Chartered Tax Adviser (CTA) in the Private Client team at Hayes solicitors. He specialises in Wills, Probate, Succession and Tax Planning and Enduring Powers of Attorney. He qualified as a solicitor in 2011 with a large Dublin law firm and then gained significant probate experience with another mid-sized Dublin firm before joining Hayes Solicitors in 2020. He is a full member of the Society of Trust and Estate Practitioners (STEP) having come first in Ireland in the Diploma in Trusts and Estates in 2014. He is a member of the STEP Ireland committee and the Dublin Solicitors Bar Association Probate and Taxation Committee. He qualified as a Chartered Tax Adviser in 2018. He acts as a consultant to other solicitors' firms in relation to private client matters.

**Finola O'Hanlon** is a Solicitor and an FITI Chartered Tax Adviser (CTA). She is a member of the Society of Trust and Estate Practitioners (STEP) Ireland. Finola specialises in the area of wealth management and advises on all taxes associated with retaining and passing wealth. This includes advising on the tax efficient structuring of Wills and lifetime transfers of wealth to the next generation.

**Úna Ryan** is a Chartered Tax Adviser (CTA), a Trust & Estate Practitioner (TEP) and is also an associate of the Institute of Chartered Secretaries and Administrators (ACIS). Úna is a Tax Director within Grant Thornton's Capital Taxes department. Úna's role centres on providing advice on a wide variety of tax issues to high-net worth individuals, small to medium sized businesses along with trust advice for both onshore and offshore structures. Úna is a graduate of University College Dublin and University College Cork where she completed her undergraduate Law degree (BCL) and Masters in Law (LLM) respectively. Úna regularly provides in-house training to the trainees of Grant Thornton and contributes regularly to the Irish Tax Institute on the CPD programme.