Managing Wealth in 2022 & Beyond

Time	Topic	Speaker
08.30 – 08.35	**Opening Remarks**	Emer Kirk, *FPSB Ireland*
Emer Kirk, Chairperson, *FPSB*		
08.35 – 09.10	**Pensions Advice in 2022 – Simplification vs Complication** • Changes to State Pension Age and qualification process • IORPII impact on > One Member Arrangements > Group Schemes • Master Trusts / Pensions Authority Strategy • Sustainable Investment Regulations • Finance Act 2021 • Pan European Pensions • Launch of Auto Enrolment	James Skehan, *Independent Professional Trustee*
09.10 – 9.25	**Q&A** with James Skehan and Emer Kirk	
09.25 – 10.00	**Tax Issues for High Net Worth Clients – Recent Trends** • Irish nationals returning from abroad • Foreign nationals moving to Ireland with weird and wonderful foreign assets • Topical wealth and estate planning trends	Lisa Cantillon, *KTA*
10.00 – 10.15	**Q&A** with Lisa Cantillon and Emer Kirk	
10.15 – 10.30	**Tea/Coffee Break**	
10.30 – 11.10	**Investment in the Current Economic Environment** • What we ought to be doing from both client engagement and portfolio management perspectives in these uncertain times	Kevin McConnell, *Gem Strategic*
11.10 – 11.25	**Q&A** with Kevin McConnell and Emer Kirk	
11.25 – 11.30	**Closing Remarks**	Emer Kirk, *FPSB Ireland*

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Biographies

Lisa Cantillon is a Director with KTA. She is a Chartered Tax Adviser (CTA) and has particular expertise in the expatriate area, advising individuals moving to and out of Ireland and related international pension and social security issues for mobile workers. Lisa also specialises in estate tax planning for gift and inheritance tax for high net worth individuals and their families. Lisa is also a contributor to the Chartered Tax Adviser (CTA) education programme and continues to lecture and speak extensively.

Kevin McConnell is Chief Executive of Gem Strategic, a specialist consultancy to financial institutions. Over a career spanning 30 years in capital markets, Kevin has worked as a strategic adviser to a range of global international institutions in the investment and banking industry, advising on capital, risk and strategy. He advises both European and North American financial institutions developing and testing capital resilience across ranges of economic and capital market scenarios/outcomes. Kevin also sits on the investment committee/board of a number of European financial institutions, in an active oversight role in investment strategy. He was, until recently, 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 has lectured on Bank Capital & Risk in Cambridge University.

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With more than 45 years of pensions industry experience under his belt, **James Skehan** FIIPM QPT PTP was Head of Pensions with New Ireland Assurance for 20 years. He also headed up General Investment Trust, the trustee subsidiary company of New Ireland, for more than a decade. James currently acts as an independent professional trustee and advises employers and trustees on pension matters.