

Financial Services Tax Update

Speaker: Nick O'Brien & Brian Lavery, *PwC*

Date: Tuesday, 25 April

Time: 08.30 – 10.30

Venue: Online via Zoom

Programme:

- Finance Act 2022: Impact on Financial Services Sector
- New tax reporting requirements for financial services taxpayers
- Crypto currency/assets
- Interest Limitation Rules - Reporting and Compliance Matters
- Impending tax changes; the 2023 legislative agenda and impact on Financial Services Sector

Time	Topic	Speakers
08.30-08.35	Introduction and Opening Remarks by Chair	Kevin Donovan, <i>Roberts Nathan</i>
08.35 - 09.20	Part 1	Nick O'Brien & Brian Lavery, <i>PwC</i>
09.20 – 09.30	10 minutes break	
09.30 – 10.10	Part 2	Nick O'Brien & Brian Lavery, <i>PwC</i>
10.10 – 10.30	Q&A Session	Nick O'Brien & Brian Lavery, <i>PwC</i>

Nick O'Brien is a Director in PwC Ireland's indirect tax practice where he specialises in advising financial services clients across a range of sectors including Banking & Capital Markets, Insurance, Asset & Wealth Management, Aircraft Leasing and Private Equity / Real Estate. Nick represents the Irish Tax Institute on the VAT Expert Group of the European Commission and is also a member of the Irish Tax Institute sub-committee of Indirect Tax TALC.

Brian Lavery is an international tax director on the PwC Dublin Asset & Wealth management team and specialises in the cross-border issues impacting asset managers operating on a global basis, including the tax efficient structuring of investment funds, tax efficient structuring of investments and the investor and LP level considerations arising as a result. Specifically, Brian focuses on alternative asset management and previously spent over two years with the PwC Chicago International Tax Team.