

# Managing Wealth in 2024

Anticipating Change



**Date:** Tuesday, 28 May 2024  
**Time:** 10.00 – 13.00  
**Venue:** Camden Court Hotel, Camden Street, Dublin 2 & Online  
**Speakers:** Alison McHugh, *EY*  
 Damian Wallace, *Wallace Financial Consultants*  
 Kevin McConnell, *Gem Strategic*

## Programme:

| Time          | Topic   |   |
|---------------|---|---|
| 09.00 – 10.00 | Networking  |   |
| 10.00 – 10.05 | Opening Remarks with Emer Kirk, <i>FPSB Ireland</i>   |   |
| 10.05 – 10.45 | Finance Act changes and impact on retirement decisions including: <ul style="list-style-type: none"> <li>• Passing to next generation or sale to 3rd party</li> <li>• 2024 v 2025 transaction and potential pitfalls or opportunities</li> <li>• Transactions for individuals aged 65/66 in 2025</li> </ul> | Alison McHugh,<br>EY Ireland                        |
| 10.45 – 10.55 | <b>Q&amp;A</b> with Alison and Emer   |   |
| 10.55 – 11.35 | Navigating the New Retirement Landscape: <ul style="list-style-type: none"> <li>• Topical retirement planning matters</li> <li>• Review of the various retirement options and development of income streams arising from the case study</li> </ul>  | Damian Wallace,<br>Wallace Financial<br>Consultants |
| 11.35 – 11.45 | <b>Q&amp;A</b> with Damian and Emer   |   |
| 11.45 – 12.00 | <b>Tea/Coffee Break</b>   |   |
| 12.00 – 12.45 | Investing in the Current Economic Environment: <ul style="list-style-type: none"> <li>• Market Update</li> <li>• What we ought to be doing from both client engagement and portfolio management perspectives</li> <li>• Considerations for investment of case study funds</li> </ul>                        | Kevin McConnell,<br>Gem Strategic                   |
| 12.45– 12.55  | <b>Q&amp;A</b> with Kevin and Emer  |   |
| 12.55 – 13.00 | <b>Closing Remarks</b>  |   |

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### Biographies:



**Alison McHugh** is a Tax Partner and Head of Private Client Services with EY Ireland. She is a Chartered Tax Adviser (CTA) with over 20 years' experience working with high net worth individuals and their families advising them on all aspects of their tax affairs including estate and succession planning, tax efficient transition of wealth to future generations, residence planning, use of trusts and optimal holding structures for holding of certain investments. Alison also works with private companies (both family business and owner managed companies) advising them on a wide range of issues including corporate restructuring, M&A, design and implementation of a governance framework, pre-sale structuring and asset protection strategies.



**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.



**Damian Wallace** is a CERTIFIED FINANCIAL PLANNER® professional and the Managing Director of Wallace Financial Consultants. The company was set up in 1990 and has evolved into one of the leading financial planning firms in the Southern region. Damian has extensive experience in advising clients on investment portfolio management, retirement solutions, business protection and inheritance and succession planning. He is a Chartered Director, holds a MSc in Financial Services from UCD and was part of the first group to secure the CFP® designation when it was first introduced to Ireland. Damian is a former Lord Mayor of Cork and has served as a director on various public boards including the Port of Cork, the National Standards Authority and Cork Opera House where he served as Chairman for over 9 years.