UK & Ireland Lifetime Planning - Tax, Inheritance & Wills

Date: Tuesday 19 November 2024
Time: 10.30 – 12.30, online via Zoom
Speakers: John Gill, *Matheson*
Patrick Harney, *Mishcon de Reya*
Barry Kennelly, *Davy*

Sponsored by: DAVY

	Topic	Speakers
10.30 – 10.35	**Introduction**	Chair: Andrea McNamara, *EY Law Ireland & STEP Ireland*
10.35 – 10.40	**Address by Davy**	Barry Kennelly, *Davy*
10.40 – 11.25	**UK & Ireland Lifetime Planning - Tax, Inheritance & Wills** • An overview of the proposed changes to the UK taxation regime for non-domiciled individuals • Broad comparison of the Irish vs UK inheritance tax regime • Tips and traps when devising an estate plan with both Irish and UK dimensions • Case study 1 – Irish domiciled and resident individual who holds significant UK situs assets (i.e., above £325k) – any lifetime and Will planning options • Case study 2 – married couple with one UK domiciled spouse and one Irish domiciled spouse who are resident in Ireland and hold assets in both jurisdictions – any lifetime and Will planning options.	John Gill, *Matheson* & Patrick Harney, *Mishcon de Reya*
11.25 – 11.30	**Break**	
11.30 – 12.15	**UK & Ireland Lifetime Planning - Tax, Inheritance & Wills** (continued)	John Gill, *Matheson* & Patrick Harney, *Mishcon de Reya*
11.15 – 12.30	**Panel Discussion and Q&A session with all speakers**	

Speaker Bios

John Gill is a partner and head of the Private Client Department at Matheson. He advises individuals and families on investment vehicles and appropriate trust structures for estate planning and asset protection purposes and he advises a number of domestic high-net-worth individuals on a wide range of taxation issues and domiciled and non-domiciled individuals with Irish tax concerns, including relocating to and establishing tax residence in Ireland, heading up the Group's Relocation Services Offering. He advises executors, trustees and beneficiaries on all legal and tax issues arising in wills and the administration of estates and trusts both domestic and offshore. John is a Chartered Tax Adviser (CTA), a past Chair of STEP Ireland, a member of the Association of Contentious Trust and Probate Specialists and the International Bar Association.

Patrick Harney is a Partner in Mishcon Private. A market-leading international private client lawyer who has worked in Dublin, London and New York, Patrick specialises in cross-border tax advice with a particular focus on US-UK and UK-Irish tax, trust and estate planning and UK resident non-domiciled tax planning. Patrick has been consistently ranked by the private wealth industry and professional directories as a leading expert in tax law. He is a Chartered Tax Adviser (CTA), an International Fellow of the American College of Trust and Estate Counsel ("ACTEC") and in November 2019 he was admitted as an Academician of The International Academy of Estate and Trust Lawyers. He is a STEP member and lectures on International Estate Planning at the STEP/Irish Law Society Diploma Course on Trust and Estate Planning.

Barry Kennelly is a Director and Tax Lead in the Private Client Department of Davy. He specialises in planning for high-net-worth individuals, with particular emphasis on estate planning including the transmission of family businesses from one generation to the next, company reconstructions and asset protection vehicles. He also advises on the use of various domestic and international trust structures. Barry is a qualified solicitor, Chartered Tax Adviser (CTA), Trust and Estate Practitioner (TEP) and a Qualified Financial Advisor (QFA) and is a former Chairperson of STEP Ireland.