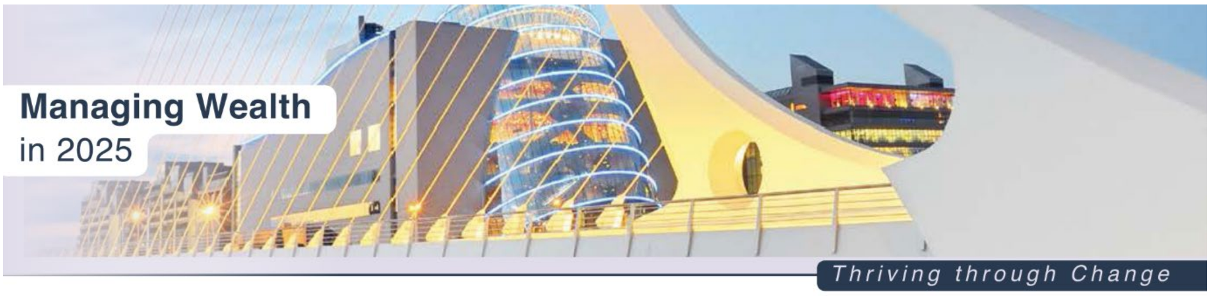

Date: Tuesday, 27 May 2025
Time: 10.00 – 13.00
Venue: Camden Court Hotel, Camden Street, Dublin 2 & Online
Speakers: Úna Ryan, *Grant Thornton*
Dr. Paul Moran, *Moran Partners Financial Planning*
Kevin McConnell, *Gem Strategic*

Programme:

Time	Topic	
09.00 – 10.00	Networking	
10.00 – 10.05	Opening Remarks with Emer Kirk, *FPSB Ireland*	
10.05 – 10.45	**Tax and modern family dynamics** • Tax implications of relationship breakdown • Scenarios in modern family dynamics • Protection of assets	Úna Ryan, *Grant Thornton*
10.45 – 10.55	**Q&A** with Úna and Emer	
10.55 – 11.35	**Behavioural Finance, Retirement Planning and Global Perspectives** • Why managing client biases matters • How the financial planning process supports better decision-making • What we can learn from Australia's retirement and pension system	Dr. Paul Moran, *Moran Partners Financial Planning*
11.35 – 11.45	**Q&A** with Paul and Emer	
11.45 – 12.00	**Tea/Coffee Break**	
12.00 – 12.45	**Investing in the Current Economic Environment** • Navigating market volatility and uncertainty • How these shifts influence investor behaviour and strategy	Kevin McConnell, *Gem Strategic*
12.45– 12.55	**Q&A** with Kevin and Emer	
12.55 – 13.00	**Closing Remarks**	

Biographies:

Úna Ryan is a Tax Partner at Grant Thornton, having joined the firm in 2008. She specialises in tax structuring, including mergers, group rationalisation, debt and equity financing, share schemes, and pre-sale restructuring. Her expertise also extends to buy-side and sell-side due diligence. Úna has extensive experience with estates and trusts for high-net-worth individuals, providing guidance on residency planning, estate planning, cross-border estate tax issues, offshore trusts, and anti-avoidance provisions. Úna is a Chartered Tax Adviser (CTA), a Trust & Estate Practitioner (TEP) and an associate of the Institute of Corporate Governance (ICG).

Dr. Paul Moran, CFP® has been both a lecturer and practitioner since 1995. He was a long-term member of the Professional Designations Committee of the Financial Advice Association of Australia and is also a current member of the Academic Advisory Panel of the FPSB. He has co-authored a number of CFP textbooks.

He holds a Bachelor of Applied Science, Diploma of Financial Planning, Master of Business Administration and Master of Taxation and Financial Planning. In 2021 Paul completed a Doctoral Thesis titled: Do Investor Beliefs About Asset Returns Produce Rational Financial Behaviours?

Paul has won numerous awards including Australian Financial Planner of the Year in 2004. While still a practicing Financial Planner, Paul is also founder and CEO of iFactFind – a secure, digital data collection tool available for advisers and their clients.

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.