

**Title:** Tax Research Skills Workshop for Chartered Tax Advisers (CTAs)  
**Date:** Thursday 28 November 2024  
**Facilitators:** Vahan Tchrakian & Audrey Kean, *Matheson*, Tatiana Kelly, *Deloitte*

### Programme

Time	Topic
09.30-10.10	Tax Research: <ul style="list-style-type: none"> <li>Defining the issue</li> <li>Establishing the facts</li> </ul> Outlining the scope of your research <ul style="list-style-type: none"> <li>Identifying all the tax issues</li> </ul>
10.10-11.10	How to identify, analyse, interpret and apply relevant statutory provisions and applicable case law  Tips and traps when applying legal tests <ul style="list-style-type: none"> <li>The rules and principles of legislative interpretation</li> </ul>
11.10 - 11.20	Tea/Coffee Break
11.20 - 12.00	Collating your research findings – <ul style="list-style-type: none"> <li>Identify potential options &amp; solutions</li> <li>Form a conclusion</li> </ul> Communicating advice  Review/refresh advice as appropriate Interacting with Revenue <ul style="list-style-type: none"> <li>Raising technical queries with Revenue</li> <li>Expression of doubt</li> </ul>
12.00 - 12.40	Research Resources Irish tax legislation, BAILLI, EUR-Lex, Curia, vLex, TAC website  Revenue website, Commentary books, HMRC website, Croner-i & Artificial Intelligence
12.40 - 13.00	TaxFind Demo
13.00 - 13.40	Lunch
13.40 - 14.50	Introduce case study(s) Participants will work together in small groups <ul style="list-style-type: none"> <li>Address the case study using the research framework and a template research memo</li> </ul>
14.50 - 15.50	Findings <ul style="list-style-type: none"> <li>Walk through the case studies</li> <li>Discuss how research should be used to build advice</li> <li>Provide feedback on case studies</li> </ul>
15.50 - 16.00	Wrap-up

### Facilitators

**Audrey Kean** is a senior associate in Matheson's Tax Department and advises on all aspects of corporate taxation including the structuring of domestic reorganisations and the tax consequences of doing business in and from Ireland. She also advises on property transactions and employment-related taxes. Audrey is a member of the Law Society of Ireland and is a Chartered Tax Adviser (CTA).

**Tatiana Kelly** is a Senior Manager in the Tax Policy and Technical team of Deloitte. She consults in-house on tax technical and policy issues, with her primary focus being in the area of international tax developments; leads out on the preparation and coordination of relevant public consultation responses to the Irish Government and pre-Budget submissions; sits on a number of TALCs; coordinates knowledge sharing within the firm on tax technical and policy matters and leads on in-house tax research skills training. Tatiana is a regular contributor to tax related professional and academic publications. She is an Adjunct Lecturer at the University of Galway, School of Law; a National IBFD Reporter for Ireland on Protection of Taxpayer's Rights and a member of the Professional Services Committee of the Irish Tax Institute. She joined Deloitte in December 2021, having previously worked in the client-facing roles in other professional practices in Ireland; with Revenue Commissioners at the Assistant Principal level and also in the academic and research environment. Tatiana is a Chartered Tax Adviser (CTA) of the Irish Taxation Institute since 2007. She graduated from the University of Galway with LLB and from the University of Oxford with MSc in Taxation.

**Vahan Tchrakian** is a partner in Matheson's Tax Department. He advises on a broad range of tax issues including cross-border reorganisations, mergers and acquisitions, and the tax consequences of doing business in and from Ireland. He also advises on employment-related taxes, and tax issues arising in the context of insolvency and property-related matters. Vahan has a particular expertise in mergers and acquisitions, having represented both buyers and sellers across a variety of industries and sectors. Vahan is a member of the Law Society of Ireland and an Associate of the Irish Tax Institute.