



Educating and Developing  
Financial Professionals



# Managing Wealth in 2019 & Beyond



## DATES AND VENUES:

<b>Galway:</b>	Clayton Hotel
<b>Date:</b>	Tuesday 11 June 2019
<b>Cork:</b>	Maryborough Hotel
<b>Date:</b>	Wednesday 12 June 2019
<b>Dublin:</b>	The Gibson Hotel & Online
<b>Date:</b>	Thursday 13 June 2019
<b>Time:</b>	08.00 - 11.30
<b>Price:</b>	€100
<b>Attend online:</b>	€85

3 HOURS CPD

Time	Topic	Speaker
07.45 - 08.00	<b>Registration</b>	
08.00 - 08.10	<b>Opening Remarks</b>	
<b>Paul Grimes, Chairperson, Grimes International</b>		
08.10 - 09.00	<b>Current Tax and Legal Issues for Diverse Family Circumstances</b> <ul style="list-style-type: none"> <li>• Tax implications of relationship breakdown</li> <li>• Managing sibling and other family relationships</li> <li>• Practical tips and traps for advisers</li> </ul>	Amanda-Jayne Comyn, <i>Philip Lee</i>
09.00 - 09.50	<b>How Pension Adjustment Orders (PAOs) can go Wrong</b> <ul style="list-style-type: none"> <li>• How PAOs work by splitting up retirement benefits</li> <li>• Practical examples/case studies of how PAOs can go wrong or give unexpected results</li> <li>• Some do's and don'ts when advising clients on PAOs</li> </ul>	Tony Gilhawley, <i>Technical Guidance Ltd</i>
09.50 - 10.15	<b>Tea/Coffee &amp; Networking</b>	
10.15 - 11.05	<b>Managing Wealth in Cooling Markets - Investing for the 'Late Cycle'</b> <ul style="list-style-type: none"> <li>• Review of the key factors driving current market valuations</li> <li>• What are the large investment "icebergs" that will shape world markets in the next 10 years</li> <li>• How to adapt client portfolios to reflect market developments with thoughts on different approaches based on stage of life</li> <li>• The Irish economic outlook in the 'post' (?) Brexit environment</li> </ul>	Kevin McConnell, <i>Gem Strategic</i>
11.05 - 11.30	<b>Closing Remarks</b>	

Each technical presentation will be followed by a discussion between the Speaker and Chair, Paul Grimes, to draw out the specific learning points and complexities.

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01 6631700

## Speakers

**Amanda Jayne Comyn, BL**, is a Partner and Head of Tax with Philip Lee. She advises the firm's clients on the commercial and tax aspects of M&As, reorganisations and restructurings, estate and retirement planning, trusts, insolvency and all aspects of property transactions with specialized experience in stamp duty and stamp duty planning. Amanda-Jayne is also a Chartered Tax Adviser (CTA) and a TEP. She is author of *Personal Insolvency Law, Taxation in Ireland and Irish Stamp Duty Law* (Bloomsbury Professional). She is editor of the Irish Tax Institute's publication *Corporate Transactions: Tax and Legal Issues*.

**Tony Gilhawley** is the founder and Principal of Technical Guidance Ltd which provides technical, educational and compliance consultancy services to providers in the life assurance and pensions industry. He has had a long involvement with various education institutes in developing Irish based educational courses for the various areas within the financial services industry. Tony is an Actuary with over 40 years' broad experience in the life assurance and pension industries. Tony is also an honorary Life Member of LIA.

**Paul Grimes** (Chair) CFP, is the Principal of Grimes International and CEO of Financial Planning Standards Board Ireland DAC. In his more than 25 years of experience in the financial services arena, he has worked with institutions and clients in Australia, Europe, the Middle East, Africa, Asia and the U.S. Paul lectures in financial planning at a post-graduate level and has been featured in a number of professional publications. He is the current chairperson of FPSB's European Forum.

**Kevin McConnell** is Chief Executive of Gem Strategic, a specialist consultancy to financial institutions. Over a career spanning 25 years in capital markets, Kevin has worked as a strategic adviser to a range of domestic and global international institutions in the investment and banking industry, advising on capital, risk and strategy. He advises both European and US financial institutions developing and testing capital resilience across ranges of economic and capital market scenarios/outcomes. Kevin sits on the investment committee of a number of financial institutions, in an active oversight role in investment strategy. He is 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 lecturers on Bank Capital in Cambridge University.

# Booking Form

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## MANAGING WEALTH IN 2018 & BEYOND

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Thursday 13 June 2019 The Gibson Hotel, Dublin & Online	<input type="checkbox"/>	€100
TOTAL		€

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