



Educating and Developing  
Financial Professionals



# Managing Wealth in 2018 & Beyond



## DATES AND VENUES:

**Galway:** Clayton Hotel  
**Date:** Tuesday 12 June 2018

**Cork:** Rochestown Park Hotel  
**Date:** Wednesday 13 June 2018

**Dublin:** The Alex & Online  
**Date:** Thursday 14 June 2018

**Time:** 08.00 - 11.30

**Price:** €100

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>Investment Planning</b> <ul style="list-style-type: none"> <li>The role of international central banks in shaping investment returns over the past 9 years and into the future</li> <li>What strategic changes in investment strategy, if any, are necessary to protect the gains of the past 9 years?</li> <li>What remunerative investment opportunities are there if headwinds blow?</li> </ul>	Frank O'Brien <i>Frank O'Brien Investment Strategies Ltd</i>
09.00 - 09.50	<b>Topical Tax Issues for High Net Worth Clients</b> <ul style="list-style-type: none"> <li>Tax considerations when structuring property investments</li> <li>The consequences of death of the main breadwinner in the family unit, and related issues</li> <li>Tax issues for entrepreneurial clients</li> </ul>	David Moran <i>Twomey Moran</i> 
09.50 - 10.10	<b>Tea/Coffee &amp; Networking</b>	
10.10 - 11.00	<b>Retirement Planning: Future Challenges and Current Opportunities</b> <ul style="list-style-type: none"> <li>Key changes to the Retirement Planning environment during 2018</li> <li>Purchasing property using pension funds - a case study</li> <li>The financial planning issues that arise in Retirement Planning - a case study looking at the entire journey from pre to post retirement and the attendant planning opportunities</li> </ul>	James Caron <i>Lucas Financial Consulting Ltd</i>
11.00 - 11.20	<b>Questions and Answers</b>	
11.20 - 11.30	<b>Closing Remarks</b>	

**New for 2018:** Each technical presentation will be followed by a discussion between the Speaker and session Chair, Paul Grimes, to draw out the specific learning points and complexities.

[www.taxinstitute.ie](http://www.taxinstitute.ie)

01 6631700

## Speakers

**James Caron**, BA, LLB, QFA, FLIA, has 30 years' experience in Financial Services, during which time he spent 8 years with Standard Life, latterly as Pensions Development Manager, moving to Ulster Bank Wealth in 2007 as Associate Director. He joined Bank of Ireland Life in 2010 where he was Pensions Manager for the West and Northwest/Midlands regions. In August 2012 James joined Lucas Financial Consulting who specialise in Retirement Planning, Investments, Business and Family Protection. These services are offered on a business-to-business basis for clients of Accountancy Practices as well as personal clients. James holds the QFA, FLIA, RPA and PTP qualifications from LIA. He also holds the Irish Institute of Pensions Management's Membership qualification (MIIPM) and the Association of Compliance Officer's qualification, LCOI. He was a member of LIA's Board of Directors (2010-2017) and was President in 2016.

**Paul Grimes**, 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.

**David Moran** is a Director of Twomey Moran Private Client Tax Advisers. David has over 20 years' experience working extensively with private clients in structuring and planning transactions and advising on a range of domestic and international tax issues. David's expertise covers all personal taxes and over the years he has built up substantial Revenue experience. David worked with Bank of Ireland Private Banking and EY prior to joining Kennelly & Twomey Limited, private client tax advisers, in 2001. David set up Twomey Moran with Kieran Twomey in July 2010. David is a Chartered Tax Adviser (CTA), has worked with the Irish Tax Institute's Educational Committee, represents the Institute at TALC Direct/Capital Taxes Sub-committee and has presented at various Irish Tax Institute and LIA seminars over the years.

**Frank O'Brien** has had a long and wide-ranging association with the investment markets as an investment analyst, fund manager, chief investment officer and consultant. He maintains this connection currently as a non-executive director of a number of investment companies and as an independent pension fund trustee. Frank is a Certified Accountant and is a former chairman of ACCA Ireland's Financial Services Network and a former president of ACCA Ireland. He is a founding member and former chairman of CFA Ireland. Frank co-authored *Fundamentals of Investment - an Irish Perspective* with Brian O' Loughlin.

# Booking Form

**Irish Tax  
Institute**

## MANAGING WEALTH IN 2018 & BEYOND

Tuesday 12 June 2018 Clayton Hotel, Galway	<input type="checkbox"/>	€100
Wednesday 13 June 2018 Rochestown Park Hotel, Cork	<input type="checkbox"/>	€100
Thursday 14 June 2018 The Alex, Dublin 2	<input type="checkbox"/>	€100
TOTAL		€

I wish to reserve \_\_\_ places in the name of:

Member No.:

First Name:

Surname:

First Name:

Surname:

Firm/Company:

Address:

Tel:

Email:

*Please indicate your preferred payment method (tick only one)*

**Cheque:** Please make cheques payable to "Irish Tax Institute"

**Credit/Debit Card:** I wish to pay by credit/debit card

Card Type: MasterCard  Visa  AmEx  Visa Debit

Card No.:

Card Holder:

Billing Address:

Expiry Date:

Total Price: €

Signature:

Date:

### **Please return this form with payment to:**

Irish Tax Institute  
South Block, Longboat Quay,  
Grand Canal Harbour,  
Dublin 2

**Refund Policy:** Full refund for written cancellations received up to five working days prior to the event, but no refund thereafter. An alternative attendee can be nominated at any time up to and including the day of the event. There is no credit allowed for non-attendance.

**Data Protection:** The Irish Tax Institute takes your privacy seriously and will only use your personal data to process your order. We will process your personal data in accordance with our privacy policy as available on our website. If you want a copy, you can write to us at cosec@taxinstitute.ie. From time to time, we would like to contact you about other products/services we provide which we believe you will also be interested in. If you consent to us contacting you for this purpose, please tick [  ]. Note: You will be able to unsubscribe at any time from our emails by following the link in our emails.

For more information or to book your place

Visit [www.taxinstitute.ie](http://www.taxinstitute.ie)

Email [cpd@taxinstitute.ie](mailto:cpd@taxinstitute.ie)

Tel 01 6631700