Irish Tax Institute

LIA

Educating and Developing Financial Professionals

Managing Wealth in 2017 & Beyond

DATES AND VENUES:

Galway: Radisson Blu Hotel
Date: Tuesday 13 June 2017

Cork: Rochestown Park Hotel
Date: Wednesday 14 June 2017

Dublin: Hilton Hotel, Dublin 2
Date: Thursday 15 June 2017

Time: 08.00 – 11.30

Price: €100

3 HOURS CPD

Time	Topic	Speaker
07.45 - 08.00	**Registration**	
08.00 - 08.10	**Opening Remarks**	
08.10 – 09.00	**The investment environment with a particular focus on:** • The implications for investors of current geopolitical uncertainties • The concerns over the impact of central bank policies on market valuations across the range of investment assets	Frank O'Brien
09.00 - 09.50	**Tax succession planning – an integrated case-study** • Sole trade versus incorporation • CGT reliefs • Taxation of property • Planning for retirement	Finola O'Hanlon & Brian Broderick, O'Hanlon Tax Ltd O'HANLON TAX LIMITED
09.50 - 10.10	**Tea/Coffee & Networking**	
10.10 – 11.00	**Pension Planning: New Dimensions** 1. UK Developments: Brexit and QROPs How will the changes impact on clients? What are the opportunities for advisors? 2. Update on Local and International Developments FA17, IORPs 2, PEPPs, Auto-enrolment… how should you and your clients respond? 3. International Pensions A fast-developing market for Irish advisors. What are the rules? How does this fit into overall financial planning? 4. Tax and Pension Planning Case Studies and Examples	Aidan McLoughlin, ITC Group ITC Your future. Our focus.
11.00 - 11.20	**Questions and Answers**	
11.20 - 11.30	**Closing Remarks**	

BOOK ONLINE AT
www.taxinstitute.ie
+353 1 663 1700

Speakers

Brian Broderick works as a tax adviser specialising in tax compliance, particularly in the areas of income tax, CAT and VAT. He works extensively in trusts and estates, with a focus on the production of fiduciary accounts for trustees and personal representatives, and tax compliance matters associated with trusts and estates, dealing with the position of trustees, personal representatives and beneficiaries. Brian advises on property transactions, covering VAT, stamp duty, and the taxation of profits, to ensure that property is transferred and held in a tax efficient manner. He has a primary degree in engineering and worked in structural engineering before moving into taxation. He is a Chartered Tax Adviser (CTA), a Trust and Estate Practitioner (TEP) and has lectured and tutored for the Law Society and other organisations.

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. They are currently preparing a third edition.

Finola O'Hanlon specialises in the area of corporate restructuring and capital taxes, together with wealth management and advises on all taxes associated with retaining and passing wealth. This includes advising on the tax efficient structuring of Wills and lifetime transfers of wealth to the next generation. As a tax solicitor, she also provides advice on tax issues arising for conveyancers, and provides a support service to accountants and lawyers who are advising on the technical aspects of appeals and Revenue litigation. Finola is a Solicitor and FITI Chartered Tax Adviser (CTA). She is a member of the Society of Trust and Estate Practitioners (STEP) Ireland and a former Council Member of the Irish Tax Institute. She is a representative on the Direct and Capital Taxes Liaison Committee (TALC) with Revenue and a member of the Dublin Solicitors Bar Association (DSBA) Probate & Taxation Committee.

Aidan McLoughlin, BCL Solr FITI TEP AIIPM, is the Managing Director of ITC Group which specialises in the provision of pension and investment structures and related services to financial advisors and their clients. Aidan is an FITI Chartered Tax Adviser (CTA) and a Fellow of the Irish Association of Pensions Management (IIPM). He is also a member of the Law Society of Ireland, the Society for Trust and Estate Practitioners (STEP) and the Association of Pension Lawyers of Ireland (APLI). Aidan is President of the Irish Brokers Association. Aidan also acts as editor of the *Irish Broker magazine*. Aidan was founding Chairman of the Association of Pensioner Trustees of Ireland (APTI). He is editor of the Irish Tax Institute's publication *Pensions: Revenue Law and Practice*.

Booking Form

Irish Tax Institute

MANAGING WEALTH IN 2017 & BEYOND		
Tuesday 13 June 2017 Radisson Blu Hotel, Galway	☐	€100
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Thursday 15 June 2017 Hilton Hotel, Dublin 2	☐	€100
	TOTAL	€

I wish to reserve ___ places in the name of:

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Email: cpd@taxinstitute.ie

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: Your personal information will be processed in accordance with the Data Protection Act 1988 and 2003. We will use your information to process your booking form. We would like to retain your details on our database in order to keep you informed about future services from the Institute. If you do not wish do receive such communication please opt out by ticking this box ☐