

**Title:** Tax Research Skills for recently qualified Chartered Tax Advisers (CTAs)  
**Dates:** Wednesday 8 Dec 2021 – Sessions 1-3 – On Demand introductory sessions  
 Wednesday 15 Dec 2022 – Session 4 - Live Session  
 Thursday 17 February 2022 – Session 5 - Live Workshop  
 Thursday 24 February 2022 – Session 6 – On Demand session  
**Facilitators:** Tomás Bailey, *Matheson* and  
 Caitriona Moran, *William Fry*  
**CPD:** 5 hours (2.15 hrs on demand and 2.45 hrs live)  
**Location:** Online  
**Price:** €95

### Programme

Time	Topic	Speakers
Wednesday 8 December 2021  Recorded materials released	<i>Introductory sessions</i> <i>Session 1 – 45 mins</i> <ul style="list-style-type: none"> <li>Irish tax legislation</li> <li>Legal basis of the Irish courts</li> <li>Irish case law</li> </ul> <i>Session 2 – 25 mins</i> <ul style="list-style-type: none"> <li>EU legislation</li> <li>Legal basis of the EU courts</li> <li>European case law</li> </ul> <i>Session 3 – 20 mins</i> <ul style="list-style-type: none"> <li>UK tax legislation</li> <li>UK case law</li> </ul>	Caitriona Moran, <i>William Fry</i>
Wednesday 15 December 2021 09.30 – 10.15	Session 4 – 45 mins Live session introducing case studies and pre-work for workshops sessions <ul style="list-style-type: none"> <li>Research resources</li> <li>Introduce case studies and pre-work for              workshop session – 3 or 4 case studies will be              released to participants</li> </ul> <i>Note: The case studies will focus on Private Client            and Corporate Transactions</i>	Tomás Bailey, <i>Matheson</i>
<i>December 2021 - Pre-work – to be carried out by participants in advance of workshop sessions</i> <ul style="list-style-type: none"> <li>Read case studies</li> <li>Identify advice being sought</li> <li>Identify research required</li> <li>Carry out the research using primary and secondary sources (including use of research              tools such as TaxFind)</li> <li>Document research in a file note and submit by 14 January 2022</li> </ul>		
Thursday 17 February 2022 09.30 – 11.30	Session 5 – 120 mins Workshop <ul style="list-style-type: none"> <li>Walk through the case studies               <ul style="list-style-type: none"> <li>Outline the advice required</li> <li>Identify the sources required for research</li> </ul> </li> </ul>	Tomás Bailey, <i>Matheson</i>

Time	Topic	Speakers
	<ul style="list-style-type: none"> <li>○ Prepare a file note outlining the research</li> <li>● Discuss how research should be used to build advice</li> <li>● Feedback on case studies</li> </ul>	
Thursday 24 February 2022  Recorded materials released	Session 6 – 45 mins <ul style="list-style-type: none"> <li>● Raising technical queries with Revenue</li> <li>● Expression of doubt</li> </ul>	Caitriona Moran, <i>William Fry</i>

**Facilitators:**

**Tomás Bailey** is a Senior Associate in the tax department at Matheson. Tomás advises Irish and multinational clients on all aspects of corporate taxation with a primary focus on tax-effective structures for inbound and outbound investment, cross-border transactions and tax controversy. Tomás has published articles and chapters in leading tax publications on international and domestic tax matters. Tomás is a qualified solicitor and Chartered Tax Adviser (CTA).

**Caitriona Moran** is a Senior Associate with William Fry Tax Advisors. She advises on a broad range of Irish tax matters for domestic and international clients. Caitriona is a Solicitor, Chartered Tax Adviser (CTA) and Trust and Estate Practitioner (STEP).