

Managing Wealth in 2023

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Date: Wednesday, 31 May 2023
Time: 08.30 – 11.30
Venue: Iveagh Garden Hotel, Harcourt Street, Dublin 2 & Online
Speakers: Brian Grimes, *Intesa Sanpaolo Life*
 Finola O’Hanlon, *O’Hanlon Tax Ltd*
 Kevin McConnell, *Gem Strategic*

Programme:

Time	Topic	Speaker
08.30 – 08.35	Opening Remarks	Emer Kirk, <i>FPSB Ireland</i>
Emer Kirk, Chairperson, FPSB		
08.35 – 09.10	Investment Risk at Retirement <ul style="list-style-type: none"> Challenges faced by individuals in managing their pension funds in retirement including: <ul style="list-style-type: none"> financial and longevity risks behavioural issues impaired capacity as they age. International perspective on coping with these challenges. Development of advice processes to better support individuals through the journey. 	Brian Grimes, <i>Intesa Sanpaolo Life</i>
09.10 – 9.25	Q&A with Brian Grimes and Emer Kirk	
09.25 – 10.00	Key Tax Issues for Individuals Close to Retirement <ul style="list-style-type: none"> Tax implications on retirement for entrepreneurial clients including: <ul style="list-style-type: none"> Pension funding and draw down considerations; CGT considerations if exiting a business; Topical retirement planning trends 	Finola O’Hanlon <i>O’Hanlon Tax Ltd</i>
10.00 – 10.15	Q&A with Finola O’Hanlon and Emer Kirk	
10.15 – 10.30	Tea/Coffee Break	
10.30 – 11.10	Investment in the Current Economic Environment <ul style="list-style-type: none"> What we ought to be doing from both client engagement and portfolio management perspectives in these uncertain times 	Kevin McConnell, <i>Gem Strategic</i>
11.10 – 11.25	Q&A with Kevin McConnell and Emer Kirk	
11.25 – 11.30	Closing Remarks	Emer Kirk, <i>FPSB Ireland</i>

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Biographies:




Brian Grimes, Brian Grimes is an Actuary with over 30 years' experience in the Life assurance industry. He is currently Head of Actuarial Function at Intesa Sanpaolo Life (Ireland's largest cross border Life Assurance Company). He previously held a number of senior roles in the domestic market across areas such as product development, the development of protection propositions, and the development of advice processes for retail customers. Brian is a fellow of the Society of Actuaries and lectures on LIA's Postgraduate Diploma in Financial Planning.



Finola O'Hanlon, *BCL, Solicitor, FITI Chartered Tax Adviser, Trust and Estate Practitioner (TEP)* specialises in the area of 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. Before specialising in tax Finola worked as a solicitor, in general practice and with the Law Society. She is a FITI Chartered Tax Adviser (CTA) and a Trust and Estate Practitioner (TEP).



Kevin McConnell is Chief Executive of Gem Strategic, a specialist consultancy to financial institutions. Over a career spanning 30 years in capital markets, Kevin has worked as a strategic adviser to a range of global international institutions in the investment and banking industry, advising on capital, risk and strategy. He advises both European and North American financial institutions developing and testing capital resilience across ranges of economic and capital market scenarios/outcomes. Kevin also sits on the investment committee/board of a number of European financial institutions, in an active oversight role in investment strategy. He was, until recently, a member of the Advisory Committee of the Certified Investment Fund Director Institute and is a Senior Associate of Faculty, Institute of Banking



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Executive Education. Kevin is a Teaching Fellow in Wealth Management on the Masters in Finance, Trinity College Dublin and has lectured on Bank Capital & Risk in Cambridge University.