

## General Information

STEP is an international body with in excess of 19,500 members worldwide. The Irish branch of STEP was formed in October 1998.

The objects of STEP Ireland include:

- Providing a forum for individuals concerned with the planning, creation, management of and accounting for trusts and estates, executorship, administration and related issues.
- Discussing aspects of tax, accounting and administration, statute and case law which are of general concern.
- Organising and holding conferences and meetings to advance knowledge and learning in respect of trusts, estates and allied subjects.

The annual conference of STEP Ireland promises to be a day of great interest to all individuals involved in the area of trusts, estates and advising private clients.

### Committee details for 2016/2017 are

Chair – John Gill

Vice Chair – Gráinne Duggan

Treasurer – Siobhán O'Moore

Committee Members:- Allison Dey, Barry Kennelly, Tina Curran, Aileen Keogan, Sandra Meade, Lydia McCormack, Mary McKeever, Tracy O'Donnell, Trea McGuinness, Jim Grogan, Andrea McNamara

Visit our website at [www.step.ie](http://www.step.ie)

## REGISTRATION

- Please complete the form overleaf and forward with the appropriate fees before 5th May 2017.
- Cancellations must be received in writing before 15th May 2017 and will be subject to an administration fee of €30.
- It is regretted that cancellations received after this time, and those not put in writing, will not be accepted and the delegate will be liable for the full conference fee.
- Substitutions may be made at any time provided the organisers are notified prior to the start of the conference.
- If a non-STEP member attends in the place of a STEP member, a charge will be made for the difference in fees.

## SPEAKERS

It may be necessary for reasons beyond the control of STEP Ireland to change the content and timing of the program, the speakers or the venue.



**Annual Conference 2017**

**Friday 19th May 2017**

**Gibson Hotel, Point Village, Dublin 1**



SPONSORED BY:



**Essential Tax, Legal and  
Private Client Update**

5 CPD hours apply



Biographies of Speakers

Lisa Cantillon, KTA

Tax for the Private Client

Lisa Cantillon is an Associate Director with Kennelly Tax Advisers Limited. Lisa is an AITI Chartered Tax Adviser (CTA). Lisa has particular expertise in employment-related tax issues, including issues faced by mobile workers. Lisa also specialises in estate tax planning for gift and inheritance tax for high net worth individuals and their families. Lisa is also a contributor to the AITI Chartered Tax Adviser (CTA) education programme and various publications.

Lisa has lectured extensively for the Irish Taxation Institute. Lisa has been a guest lecturer for various financial advisory organisations in respect of estate tax planning. Lisa is also the chair of the Dublin Chartered Tax Advisers Branch Network and sits on the Education Committee for the Irish Taxation Institute.

Summary of talk

- Why do Trust and Estate practitioners need to know about the remittance basis of taxation?
- Future proofing your client's estate – gift and inheritance tax for private clients
- General practical tax issues on death
- The changing UK landscape and the impact in Ireland
- Other topical private client tax issues

Sasha Kerins, Grant Thornton

Business Structures & Succession for Private/Family Business

Sasha has extensive experience in practice and industry with a focus on a variety of sectors such as food and agriculture, construction and e-commerce.

She advises medium/large privately held businesses on corporation tax and succession planning as well as working with international tax clients on international corporate re-organisations and structuring.

Sasha leads Grant Thornton's Diversity and Inclusion (D&I) programme EMBRACE and heads up Grant Thornton's Agri-Food Sector group.

Summary of talk

- Early transfer of assets
- Family Partnerships
- Holding Companies & Entrepreneur Relief
- Business Asset Relief
- Retirement Relief
- Discretionary Trusts
- Pension advice on inheritance
- Inheritance from abroad
- Dwelling house relief update

Joe McLoughlin, Smith & Williamson

World Gone Mad: Current Economic and Investment Considerations

Joe McLoughlin is an investment manager with Smith and Williamson, based in London and Dublin. In 2016, Joe served as a STEP Judge and in 2017 will sit on one of the STEP Panel of Experts. He has 20 years' experience in the finance industry, 18 of these focusing exclusively on investment management for private clients and charities. Joe's experience centres on building bespoke portfolio solutions to meet client requirements, using equities, fixed income and alternative investments. He has implemented strategies for clients across the risk spectrum, working closely with professional advisers in most cases.

Joe holds a Bachelor of Commerce degree from University College Dublin and studied Actuarial Science at the Michael Smurfit Graduate School of Business. He attained the Investment Management Certificate (IMC), the Private Client Investment Advice & Management (PCIAM) certificate, is a Member of the Chartered Institute for Securities and Investment in UK, and is also a Chartered Wealth Manager (CISI designation).

Summary of talk

- Politics and populism are influencing financial markets more than ever
- How should governments respond to the rise of populism?
- What implications does this have for investors in financial markets?
- Round up of global investment opportunities

Teresa Pilkington SC

Update on Probate Practice

Teresa Pilkington is a Senior Counsel with a broad based practice specialising in the areas of contentious and non contentious claims concerning land law and conveyancing, building and construction, guardianship, the law of charities, trust law and probate.

Summary of talk

A review of recent case law which will include the following topics:

- Role and function of personal representatives
- Admission of extrinsic evidence
- The doctrine of proprietary estoppel
- Judgements delivered by the Probate Judge in the non-contentious probate jurisdiction

Patrick Harney, Head of Private Client at Forsters

Navigating the Anglo-Irish Mindfield! UK-Irish Tax and Estate Planning after Brexit

Patrick is an international private client lawyer with experience in private client tax and trust planning in the UK, Ireland and the US. He specialises in UK tax planning for non-domiciliaries and has particular experience in US-UK and UK-Irish tax planning. Patrick is recognised by his peers and the private wealth industry as a leading expert in this area of law.

Patrick advises high net worth individuals on tax efficient structuring of property transactions. He also advises domestic UK families on wealth structuring and has a particular expertise in the use of family partnerships and family investment companies as a tax efficient wealth holding vehicle.

Patrick qualified as a solicitor in Ireland in 1997 and in England and Wales in 2003. He spent two years on secondment to a leading private client law firm in New York before joining Forsters as a partner in 2007.

Patrick is recommended in the Legal 500 2016, Who's Who Legal 2015, the Citywealth Leaders List 2014 and is recognised in the 2014 edition of Super Lawyers. He has been profiled in The Spear's Index of the Top 50 Tax Advisors, September / October 2015.

He has written and lectured extensively on US-UK tax and estate planning and is a regular speaker on cross-border US-UK tax matters in both the US and the UK. Patrick lectures on International Estate Planning at the STEP/Irish Law Society Diploma Course in Trust and Estate Planning.

Summary of talk

- UK inheritance tax contrasted with CAT
- Excluded property trusts
- Minefields
  - Discretionary trust wills for doubly taxed assets
  - Non-domiciled spouse election
- Update on recent UK tax changes
- Returning non-doms
- 15 out of 20 year rule and protected settlements
- End of residential property situs blocking
- Case studies

Jenny Afia, Schillings

Reputation in the Digital Age

Jenny helps people in the public eye have more privacy. She works pro-actively with family offices, managers, PRs and other advisers to reduce threats to reputation and intrusions into personal lives. When issues arise, Jenny applies the laws of confidence, defamation, harassment, IP and data protection to put out fires. In addition to being ranked as a leader in her field in Chambers & Partners and the Spear's 500 Index, Jenny was also Spear's Magazine's Reputation and Defamation Lawyer of the Year in 2015. She is a regular contributor to The Huffington Post.

Summary of talk

- An update on legal trends in reputation management online
- Using the law to protect reputation and privacy online
- Understand technology to know what can be done through cyber teams
- Recognise the online environment in which you are operating and having the right plans in place
- Bridging the gap between lawyers, private clients and their families' to achieve good results in complex cases.

STEP Annual Conference

Programme

Time	Speaker / Subject
9.00 – 9.15	Registration
9.15 – 9.45	The Hon. Ms Justice Marie Baker
	Opening Address
9.45 – 10.30	Lisa Cantillon, KTA
	Tax for the Private Client
10.30 – 11.15	Sasha Kerins, Grant Thornton
	Business Structures & Succession for Private/Family Business
11.15 – 11.45	Coffee
12.00 – 12.45	Joe McLoughlin, Smith & Williamson
	World Gone Mad: Current Economic and Investment Considerations
12.45 – 13.00	Questions and Answers
13.00 – 14.00	Lunch
14.00 – 14.45	Teresa Pilkington SC
	Update on Probate Practice
14.45 – 15.30	Patrick Harney, Head of Private Client at Forsters
	Navigating the Anglo-Irish Mindfield! UK-Irish Tax and Estate Planning after Brexit
15.30 – 16.15	Jenny Afia, Schillings
	Reputation in the Digital Age



Ireland

ADVISING FAMILIES ACROSS GENERATIONS

REGISTRATION FORM

See notes overleaf.

This form may be photocopied for additional delegates.

Please print in block capitals.

First Name
Last Name
Firm/Organisation
Address
Telephone
Facsimile
E-Mail

Conference Fee
Student / Trainee / 1-3 Year Qualified €125
STEP Member: €250 • Non-STEP Member: €330

Please send cheque or draft payable to STEP Ireland and completed registration form to:

Michelle McGregor,  
Matheson,  
70 Sir John Rogerson's Quay, Dublin 2.  
D: +353 (1) 232 2141 T: +353 (1) 232 2000  
F: +353 (1) 232 3333 E: michelle.mcgregor@matheson.com  
or

Payment can be made by electronic fund transfer to the following bank account. Please include delegate name as a reference so that we can allocate payment.

Name:	Society of Trust & Estate Practitioners
Account:	58801468
IBAN:	IE77 BOFI 9014 9058 8014 68
Bank:	Bank of Ireland
BIC:	BOFIE2

Places will be limited to 100, so early booking is advised. Details of attendees received after 5th May 2017 will not be included with the papers circulated at the conference.