

## General Information

STEP (Society of Trusts and Estate Practitioners) is an international body with in excess of 10,000 members worldwide. The Irish branch of STEP was formed in October 1998.

The objects of the Society include

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

The annual conference of STEP in 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 2010/2011 are

Chairperson - Mary Condell

Vice Chairperson - Nora Lillis

Treasurer - Edmond O'Regan

Secretary - Sarah Cox

Membership and Education Secretaries -  
John Gill and Catherine Duggan

Seminars Officer - Beryl Power

Website Administrators -  
Sinead Kelly and Padraic Courtney

Committee Members  
Nuala Casey, Cian O'Sullivan, Cormac Brennan, Barry  
Kennelly and Shane MacNamara

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

### REGISTRATION

- Please complete the form overleaf and forward with the appropriate fees before 13th May 2011.
- Cancellations must be received in writing before 20th May 2011 and will be subject to an administration fee of €30.
- It is regretted that cancellation received after this time, and those not put in writing, will not be accepted and the delegate will be liable for the 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 2011

Friday 27th May 2011

Radisson SAS St. Helen's Hotel,  
Stillorgan Road, Dublin 4



## Challenging Times for Practitioners

5 CPD hours apply (1 hour of which qualifies for management and professional development skills)

## Biographies of Speakers

### Madeleine Loughrey Grant, Farrer & Co LLP

Madeleine Loughrey Grant is a partner in the International Private Client team of Farrer & Co in London. She advises on trust, estate planning and taxation issues particularly in the context of international planning. Madeleine also advises on the creation and operation of offshore asset holding structures. Madeleine is admitted as a solicitor in the Republic of Ireland and in England and Wales. She is on the board of contributing editors for the Journal of International Tax, Trust and Corporate Planning. She is a member of STEP England & Wales and is a committee member of the Irish Law Society Probate, Administration and Trusts Committee and is also a committee member of the STEP EU Committee.

### Audrey Byrne, McCann FitzGerald

Audrey Byrne is a partner in McCann FitzGerald, Solicitors. Audrey practices in all kinds of dispute resolution with a particular focus on family law and family business disputes. Audrey is a trained Mediator and is AITI qualified.

### Aidan McLoughlin, Independent Trustee Company

Aidan 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.

A graduate of UCD, Aidan qualified as a solicitor and a tax consultant in 1987. Aidan is a Fellow of the Institute of Taxation in Ireland (ITI) and the Irish Association of Pensions Management (IIPM). In addition he is 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 a council member of the Irish Brokers Association and currently chairs both the Pensions and Communications Committees. 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 Taxation Institute's publication "Pensions - Revenue Law & Practice" - a comprehensive textbook and industry bible. Aidan has also contributed to "Capital Acquisitions Tax" by Brian Bohan.

He has presented at many industry seminars and has tutored and delivered seminars to students and members of the above Associations and has contributed articles on pensions, tax and legal matters to numerous publications.

### Julie McAuliffe

Julie McAuliffe is an accredited practitioner mediator of the Mediators Institute of Ireland since 1999 and has worked full time in this field since. She obtained a Masters Degree in Mediation and Conflict Resolution in 2005 from UCD. Julie is the Director of Conflict Positive which offers Mediation, Conflict Coaching and Mediation Training. In addition to her own practice Julie also works for the Family Mediation Service. She mediates complex multi party disputes, as well as interpersonal misunderstandings, bullying and harassment issues and family disputes. Julie promotes Collaborative Mediation where solicitors and mediators work collaboratively in mediation to maximise the benefit for the client. Julie lectures and provides skills training in mediation for The Law Society, NUI Maynooth, UCD and The Institute of Public Administration. Julie has served on The Mediator's Institute of Ireland Executive Board and as Registrar with The Mediators Institute Ireland.

### Margaret Walsh, Sheil Solicitors

Margaret Walsh is a Partner in Sheil Solicitors, Dublin specialising in Private Client work with a particular interest in the law as it relates to the elderly and vulnerable. She is a member of the Law Society's Probate, Administration and Trusts Committee and of the sub-committee of the Society's Guidance and Ethics Committee specifically addressing the financial abuse of the elderly. Margaret is a Committee Member of the newly formed organisation SFE Ireland and is the Editor of "Irish Conveyancing Precedents".

### Catherine Duggan, Law Library

Catherine Duggan BL practices as a barrister specialising in probate and trust law and has extensive litigation experience in these areas. Catherine previously spent five years working in Trust Services with Bank of Ireland. She is a member of the committee of the Society of Trusts and Estate Practitioners.

## STEP Annual Conference

### Programme

Time	Speaker / Subject	
9.30 – 9.45	David Harvey, STEP Introduction	<ul style="list-style-type: none"><li>The conflict spiral and conflict de-escalation.</li></ul>
9.45 – 10.30	Madeleine Loughrey Grant, Farrer & Co LLP Cross Border Estate Issues, The European Dimension	<ul style="list-style-type: none"><li>How to approach working with a client who is entrenched in conflict and in "locked down mode".</li><li>The Grief Process.</li><li>How to approach working with a client who is bereaved.</li></ul>
	<ul style="list-style-type: none"><li>An outline of the challenges for cross border estates</li><li>The road to harmonisation</li><li>An overview of the draft EU Succession Regulation</li><li>Implications of changing EU rules.</li></ul>	<ul style="list-style-type: none"><li>How to use and encourage the use by your client of collaborative negotiation principles and processes whilst staying within your professional role, your own and your client's expectations of it and the limitations imposed by it.</li></ul>
10.30 – 11.15	Audrey Byrne, McCann FitzGerald The Role of Agreements in Today's Relationships	2.30pm – 3.15pm Margaret Walsh, Sheil Solicitors Enduring Powers of Attorney – Fit for Purpose
	Pre-nuptial Agreements	<ul style="list-style-type: none"><li>A review of Enduring Powers of Attorney fifteen years on.</li><li>Issues encountered by Practitioners prior to, during and post registration.</li><li>Conflicts of interest.</li><li>Joint and Several Attorneys. How to advise them.</li><li>Taking instructions. Capacity. Joint Accounts. Gifts.</li><li>Implications for EPAs in the Heads of the Mental Capacity Bill.</li><li>Death of the Donor</li></ul>
	<ul style="list-style-type: none"><li>Legal and taxation considerations</li><li>Recent developments</li><li>Drafting considerations</li></ul>	
	Pre-registration contracts for Civil Partners	3.15pm – 4.00pm Catherine Duggan, Law Library Recent developments in Litigation
	<ul style="list-style-type: none"><li>Legal issues and taxation issues</li><li>Drafting considerations</li></ul>	<ul style="list-style-type: none"><li>An overview of recent judgments on will challenges and any new guidelines for the solicitor taking instructions for a new will.</li><li>Developments affecting administration of estates - valuation date of legal right share (Strong v Holmes (2010)).</li><li>Recovering Estate Assets – Section 121 Succession Act 1965.</li><li>Removal of Executors and Trustees – Rights of Beneficiaries.</li><li>Variation of Trusts – Land and Conveyancing Law Reform Act 2009.</li></ul>
	Cohabitation agreements	
	<ul style="list-style-type: none"><li>Legal issues and taxation issues</li><li>Drafting considerations</li></ul>	
11.45 – 12.30	Aidan McLoughlin, Independent Trustee Company	
	Pensions: Retirement, Business Exit and Tax Planning	
	<ul style="list-style-type: none"><li>General over-view of various pension arrangements</li><li>How pensions have evolved as an estate planning, wealth accumulation tool</li><li>Significant recent changes to the pensions landscape</li><li>Update on capital tax planning in context of business exit</li><li>Worked Examples</li></ul>	
1.45pm – 2.30pm	Julie McAuliffe Dealing with Difficult and Vulnerable Clients	
	<ul style="list-style-type: none"><li>Understanding how interpersonal conflict and/or the grieving process can pose challenges to a client's ability to engage in problem solving, risk assessment and creative thinking.</li></ul>	



### 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

STEP Member: €250

Non-STEP Member: €330

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

Amy Henry  
William Fry  
Fitzwilton House, Wilton Place, Dublin 2

D: +353 (1)639 5383

T: +353 (1) 639 5000

F: +353 (1) 639 5333

E: amy.henry@williamfry.ie

Places will be limited to 100, so early booking is advised. Details of attendees received after 13th May 2011 will not be included with the papers circulated at the conference.