



**Irish Tax
Institute**

Leaders in Tax

Business Succession – Tax, Legal & Other Issues

Date: Thursday 30 August 2012 & Online		Location: Radisson Blu Royal Hotel, Dublin 8	
CPD: 3 hours	Price: €135	Online Price: €115	Time: 08.30 – 11.30
Topics:		Speakers:	
Tax Issues		Ann Williams, Taxation Consultant	
Legal Issues		Cormac Brennan, Partner, O'Connell Brennan Solicitors	
Other Issues and Perspectives		Dave Gribben, Managing Director, Enable Consulting	




Book online at www.taxinstitute.ie

CORMAC BRENNAN is a Partner in O'Connell Brennan Solicitors, a private client legal firm established in 2012. Prior to that, Cormac worked as a senior associate solicitor within the Private Client department of McCann FitzGerald. Cormac specialises in personal estate and tax planning, wills and succession, trusts (both domestic and international), the administration of estates and contentious probate and trust issues. Cormac is a committee member of the Society of Trust and Estate Practitioners (STEP) Ireland. He has written and lectured extensively in his areas of expertise, and he co-ordinated the STEP Diploma 2012 on behalf of STEP Ireland and in conjunction with the Law Society of Ireland. He is also an AIT Chartered Tax Adviser (CTA).

DAVE GRIBBEN is the Founder and Managing Director at Enable a business performance consultancy – www.enableconsulting.ie. He has spent over 30 years working in Ireland, 25 years of which have

been in management and leadership roles in large corporates and SMEs. In that time he has been building and leading senior teams (often family members) to grow & develop businesses as well as take strong defensive actions in tough economic times. Dave brings his practical knowhow to businesses, in a hands-on way, helping them 'enable' enduring business strategy and high performance relationships both at a team and individual level.

ANN WILLIAMS is a taxation consultant and is in private practice. She was formerly a director of KPMG's Private Client Services practice. She has many years' experience in estate tax planning, as well as in advising family companies and individuals on the tax issues surrounding the management and preservation of assets. Ann is co-author of the Irish Tax Institute's publications *Trust and Succession Law and The Taxation of Gifts and Inheritances*.

Programme		
Time	Topic	Speaker
08.30 – 08.45	Registration	
08.45 – 09.30	Tax Issues <ul style="list-style-type: none"> > The importance of a business succession plan > Capital tax reliefs, liabilities and payment > Tax implications of accessing funds > Succession and other retirement planning considerations 	Ann Williams, Taxation Consultant
09.30 – 10.15	Legal Issues <ul style="list-style-type: none"> > Business succession from a legal perspective > The importance of Wills & Enduring Powers of Attorney > Legal structures for succession planning, including shareholders' agreements & partnership agreements 	Cormac Brennan <u>O'Connell Brennan</u> Solicitors
10.15 – 10.30	Tea/Coffee	
10.30 – 11.15	Other Issues and Perspectives <ul style="list-style-type: none"> > Assisting families to engage in the process of business succession > Dealing with and resolving disputes between shareholders > Highlighting non tax/legal issues which practitioners need to address in this area 	Dave Gribben 
11.15 – 11.30	Questions & Answers	



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