
STEP

Society of Trust and
Estate Practitioners

NI



JOINT CONFERENCE

STEP: Northern Ireland and STEP: Ireland

DATE	Friday 20 th June 2014
TIME:	12.00pm – 4.30pm (lunch served from 1.15pm)
PLACE:	Hilton Hotel, Belfast
COST:	Free of charge to members of STEP
CPD Allocation:	Solicitors and Barristers: 3 hours This event should qualify for CPD purposes for other professional bodies

Seminar Information

STEP: NI is delighted to invite you to this joint event with our colleagues in STEP: Ireland which aims to continue the usual successful format of covering important topics of the moment which are of interest to all those involved in trust and estate matters as well as the usual practical updates.

The event will also create a valuable forum for debate and networking between members of STEP: NI and STEP: Ireland who will find the seminar to be an essential component of their continuing professional development programme.

Programme

Friday 20th June 2014

- 11.45-12.00pm Registration and Coffee
- 12.00-12.15pm **Welcome and Introduction**
Michael Graham TEP, Chair STEP: NI and
Catherine Duggan TEP, Chair of STEP Ireland
- 12.15-1.00pm **FATCA and Anti-Money Laundering: Implications for Trustees**
George Hodgson TEP, Deputy Chief Executive, STEP
- 1.00-1.15pm **FATCA from an Irish perspective**
Tina Curran TEP William Fry Solicitors
- 1.15-2.00pm **Lunch**
- 2.00-2.45pm **Powers of Attorney : Cross Border Issues**
Richard Frimston TEP, Partner Russell-Cooke
- 2.45-3.45pm **The Functional Test for Capacity in the Context of New Legislation North and South**
Mary Condell TEP, Sheil Solicitors and Linda Johnston TEP,
Francis Hanna & Co Solicitors
- 3.45- 4.30pm Q& A followed by Networking and Refreshment Break

Speakers

Mary Condell is a solicitor in practice with Sheil Solicitors in Dublin. She is a regular lecturer for the Law Society and other professional bodies on legal and mediation issues. She is a member and former chair of the Irish branch of the Society of Trusts and Estate Practitioners (STEP). She completed initial mediation training in 2007 and has worked as a mediator with particular interest in disputes in the area of the administration of trusts and estates. She is a certified member of the Mediator's Institute of Ireland, has completed training in Elder Mediation and has just completed a Masters in Mediation and Conflict Resolution in NUI Maynooth. She is a co-founder and chair of Solicitors for the Elderly (SFE) in Ireland and has given training courses in mediation skills to SFE members in the UK as well as in Dublin. She is a member of the Law Society's Task Force on Mental Capacity and of the National Financial Abuse of Older People Working Group

Tina Curran is a solicitor in the Private Client Department of William Fry in Dublin. She is a committee member of STEP Ireland and an external examiner on the STEP Ireland Diploma course on which she also lectures. She is a student member of the Irish Taxation Institute. She regularly advises on the establishment and administration of trusts including related tax and compliance aspects. She graduated from the University of Limerick.

Richard Frimston is a Partner and Head of the Private Client Group at Russell-Cooke where he advises clients in relation to their wills, probate and tax planning issues and offers Notary Public services. His areas of expertise include cross-border estates and international private law issues. Richard is a member of various professional bodies including the European Law Institute, the British Institute of International and Comparative Law, the International Academy of Estate and Trust Law and the Association of Contentious Trust and Probate Specialists. Richard was awarded 'The Society of Trust and Estate Practitioners (STEP) Founder's Award' for outstanding achievement (December 2010). He is currently Chair of the EU STEP Committee and co-Chair of the STEP Public Policy Committee. He is Co-author of Sweet & Maxwell's **European Cross-Border Estate Planning** and the international sections of Heywood & Massey and Jordan's **Court of Protection Practice**, Richard regularly gives lectures and publishes articles in *Private Client Business*, *New Law Journal* and various other legal journals.

George Hodgson is Deputy Chief Executive of STEP. Prior to joining STEP he held a senior policy position at the Association of British Insurers, the main insurance industry trade body in the UK and has also served on the staff of the Treasury Committee of the UK House of Commons. Prior to moving to public policy work, Mr Hodgson had a career in investment banking that spanned over 20 years as one of the top rated economists and investment strategists. He holds economics degrees from the University of Durham and the University of Stirling and has been the author of many articles and research reports on trusts, taxation and investment issues.

Linda Johnston is a Partner with Francis Hanna & Co Solicitors. With a background in Property Law and Probate she has a particular interest in mental capacity and law as it affects the older client. She has been a Director of Age NI since the charity was set up in 2009. A member of the Mediators Institute of Ireland (MII) for many years, Linda first trained in mediation at Harvard Law School in the summer of 1997, and became a CEDR accredited Mediator in 2004.

Your reservation details:

Please post, phone or email to:

STEP: Northern Ireland
PO Box 415
Lisburn
BT28 9EE

Email: sgrattanbl@aol.com

Telephone: 028 92 640257

Joint Conference: STEP: NI and STEP: Ireland

Please reserve ____ place(s) on **20th June 2014 at the Hilton Hotel, Belfast**

Cost: Free of charge to Members of STEP

STEP Membership Number _____

NAME(S) _____

ADDRESS _____

TEL _____

FAX _____

DX _____

EMAIL _____

Please indicate any special dietary or access requirements.

STEP: NI would like to keep you updated via email on future events which may be of interest to you. If you do **not** wish to receive further information please tick this box