

## Vulnerable Family Members: Will or What?

1 December 2022

12.00pm to 2.00pm

Remotely by webinar

**Chair: Owen Burke** will speak on the pitfalls that might arise if you don't adequately plan for a vulnerable child/family member  
**Anne Stephenson** on drafting Discretionary Will Trusts for vulnerable family members  
**Brian Broderick** on taxation considerations relating to will drafting and providing for vulnerable adults

### SPEAKERS:

#### OWEN BURKE:

Owen Burke is a Senior Associate Solicitor, Trust and Estate Practitioner and Chartered Tax Adviser in the Private Client team at Hayes Solicitors LLP. He specialises in Wills, Probate, Succession and Tax Planning and Enduring Powers of Attorney. He is a full member of the Society of Trust and Estate Practitioners (STEP) and a member of the STEP Ireland committee and the Dublin Solicitors Bar Association Probate and Taxation Committee.

#### ANNE STEPHENSON:

Anne Stephenson is Principal of Stephenson Burns Solicitors. She is a member of; STEP, the DSBA Probate and Taxation Committee, the Probate Liaison Committee. She is a founder member of Solicitors for the Elderly and Chair of the Law Society's Probate Administration and Trust Committee. She lectures, examines and tutors on the Law Society's Professional Courses (PPC 1 & 11) on the Wills Trusts, Probate, Tax Planning and Conveyancing Modules and on the STEP Diploma in Wills, Trust & Estate Planning. She also lectures for CPD, Skillnets, the DSBA, STEP Ireland SFE and for regional Bar Associations and other professional bodies. She is the co-author of the Oxford University Press (OUP) Manual on "Wills Probate and Estates" 6th Edition, and the OUP Manual on "Conveyancing", 8th Edition and the co-author of OUP Manual on "Capital Taxation" 2nd edition. She is a contributor to "Laffoy Irish Conveyancing Precedents"-executors and administrators. She also contributes to the Law Society Gazette, the Parchment, and the Irish Tax Review. Anne leads the successful bi-annual Stephenson Solicitors' Seminar series which is in its 20th year, and regularly attracts large numbers of professional and institutional attendees to consider issues of interest in the field of Wills, Trusts Estate Law and Probate and Capital Taxes.

#### BRIAN BRODERICK:

Brian Broderick is an Associate Director with KTA. He is an AITI Chartered Tax Adviser (CTA) and a Trust and Estate Practitioner (TEP) specialising in private client taxation. He has extensive experience in inheritance tax planning and dealing with tax issues relating to the administration of trusts and estates, the tax implications for beneficiaries, advising clients on how to pass assets tax efficiently to the next generation and complex tax compliance relating to cross-border matters.

He advises private clients and business owners on how to arrange their affairs tax efficiently, which includes advice on optimising the tax position in Ireland in cross-border scenarios involving double taxation treaties, individuals residing in a number of jurisdictions, assets held outside of Ireland and other related issues. Brian has lectured for the Law Society, the Society of Trust and Estate Practitioners (STEP), the Irish Tax Institute (ITI) and other organisations.



**Conference Information**

Date: 1 December  
Time: 12.00pm to 2.00pm  
Location: **By webinar,**

Fees: € 100.00 Member  
€ 200.00 Non Member

Registration: **LOG IN DETAILS WILL BE EMAILED TO ALL PARTICIPANTS**

CPD: **2 Hours Group Study**

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**Conference Registration Form (Probate and Tax)**

Please complete the registration form below and send this with your payment to:-  
**Maura Smith, Dublin Solicitors Bar Association, Unit 206, The Capel Building,  
Mary's Abbey, Dublin 7. DX 200206 Capel Building**

Surname \_\_\_\_\_

First Name \_\_\_\_\_

Firm/Organisation \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax. \_\_\_\_\_

Year of Admission \_\_\_\_\_ DX \_\_\_\_\_

E-Mail Address \_\_\_\_\_

Payment By Cheque, Card or EFT payable to **Dublin Solicitors Bar Association**

[ ] Member  
[ ] Non-Member  
[ ] Trainee (in a member firm)

**CONFIRMATIONS**

Booking confirmations will be issued to all delegates by e-mail or fax prior to the seminar. Please present your booking confirmation at the seminar registration desk.

**CANCELLATIONS**

Cancellations must be received in writing. For cancellations received 5 working days or less prior to the event, the attendance fee is non refundable.

**DISCLAIMER**

It may be necessary, for reasons beyond the control of the conference organisers, to alter the content and timing of the program or the identity of the speakers.

**For Additional Information contact:-  
Maura Smith – Tel.: 01 6706089 – E-Mail: [maura@dsba.ie](mailto:maura@dsba.ie) – Web: [www.dsba.ie](http://www.dsba.ie)**