



**THE DUBLIN SOLICITORS BAR ASSOCIATION
CONTINUING PROFESSIONAL DEVELOPMENT SEMINAR**

Probate and Tax Committee

“Administering the estate - It ain’t over till it’s over!”

**23 May 2023
3.00pm to 5.00pm
VIA WEBINAR**

Chair: Patricia Hickey

Speakers:

Anne Stephenson: Dealing with all types of beneficiaries (minor, vulnerable, deceased, missing, and contentious beneficiaries; beneficiaries under a disability; overseas beneficiaries); communications with beneficiaries and what information can be given.

Brian Broderick: Tax clearances for beneficiaries and legal personal representatives, here and overseas.

Padraic Courtney: Common queries to the Law Society Probate, Administration and Trusts Committee and some unusual titles.

Speakers:

Anne Stephenson is the 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.

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.

Padraic Courtney is a solicitor who has worked for the Law Society’s Law School as a course manager specialising in Probate and Taxation matters for over 20 years. He is a member of STEP and also a founder committee member of SFE Ireland and is Secretary to the Law Society’s Probate and Taxation Committee

Patricia Hickey is the General Solicitor for Minors and Wards of Court. Prior to this appointment, she worked for 10 years as a Senior Solicitor in the Office of the General Solicitor. Before specialising in the areas of Elder Law, Vulnerable Adults and Minors and Wardship and Mental Health Law she worked as a solicitor, in general practice.



PLEASE NOTE MEMBERSHIP FEES FOR 2023 ARE NOW DUE

Conference Information

Date: 23 May 2023
Time: 3.00pm to 5.00pm
Registration: Link will be sent by email.
Location: **VIA WEBINAR**

Fees: € 130.00 Member
€ 240.00 Non-Member

CPD: **2 Hours Group Study**

Conference Registration Form (Probate)

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 – Web: