THE DUBLIN SOLICITORS BAR ASSOCIATION CONTINUING PROFESSIONAL DEVELOPMENT SEMINAR

PROBATE AND TAX COMMITTEE

Protect your LPR - Taxes and Administration of Estates

16 September 2025 12.30pm-2.30pm VIA WEBINAR

Every probate file is also a tax file, and it is not, if ever it was, sufficient solely to advise the Legal Personal Representative on Probate issues. The responsibilities and liabilities of Legal Personal Representatives and indeed Solicitors to ensure all taxes are discharged is increasing all the time.

The lecture will not be a highly technical tax lecture but a practical one. It will outline the tax steps needed through the prism of a LPR/Solicitor Agent both pre and post death in the administration of estates. The following taxes will be considered.

Capital Acquisitions Tax, Income Tax, Discretionary Trust Tax, Stamp Duty, Capital Gains Tax and Vacant Homes Tax as well as the effect of Disclaimers and Deeds of Family Arrangements on same.

Handy check lists for practitioners will be included.

It will also cover Revenue Powers /Appeals and online applications for "clearances" in general and for where there are non-resident LPR or Beneficiaries and how best to protect ourselves in such cases

Finally, of course we will also cover valuation and file and pay dates for the various taxes.

Speaker

Anne Stephenson: Principal of Stephenson Solicitors. She is a member of; STEP, the DSBA Probate and Taxation Committee and the Probate Administration and Trust Committee of the law Society. She lectures, examines and tutors on the Law Society's Professional Courses and on the Wills Trusts, Probate, Tax Planning 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) Manuals on "Taxation for Solicitors" recently published, "Wills Probate and Estate" 8th Edition, and "Conveyancing", 8th 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.

Q&A GUEST: Brian Broderick 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, dealing with tax issues relating to the administration of trusts and estates, to include complex tax planning and compliance relating to cross-border matters and double taxation treaties. Brian also advises business owners on how to arrange their affairs tax efficiently, to structure for business sales, succession, or a combination of both. This includes advising on cross-border scenarios involving double taxation treaties, individuals residing in a number of jurisdictions, assets held outside of Ireland and other related issues.

CHAIR: Úna Burns is Principal of Úna Burns Solicitors based in Blackrock, County Dublin. She has over 15 years' experience specialising in the area of wills, trusts, probate and tax and advises colleagues and private clients on all aspects of probate law and estate administrations. She is a member of STEP (Society of Trust and Estate Practitioners) and a committee member of the DSBA's Probate and Tax Committee and Solicitors for the Elderly, Ireland. She is a regular speaker on her specialist topics to colleagues and the public alike and has contributed to various publications including the Law Society Gazette and the DSBA's Parchment magazine.

Conference Information

Date: 16 September 2025
Time: 12.00pm to 2.30pm
Location: VIA WEBINAR

Log in details will be emailed to all participants

Fees: €130.00 Member

€245.00 Non-Member

CPD: 2 Hours Group Study

Conference Registration Form (probate and tax)

Please complete the registration form below and send this with your payment to:-

Anna Healy, Dublin Solicitors Bar Association, Unit 206, The Capel Building, Mary's Abbey, Dublin 7. Dx 200206 Capel Building

Surname		
First Name		
Firm/Organisation	1	
Address		
Telephone		Fax
Year of Admission		DX
E-Mail Address		
Payment	BIC (SW	ue, payable to Dublin Solicitors Bar Association, Card, of EFT IFT) BOFIIE2D IE74 BOFI 900973 81308890
		[] 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:-

Anna Healy – Tel.: 01 6706089 – E-Mail: anna@dsba.ie – Web: www.dsba.ie