

LAW SOCIETY PROFESSIONAL TRAINING

Centre of Excellence for
Professional Education and Lifelong Learning



Probate Update 2022

Date	10 March 2022
Time	2:00pm – 5:15pm
Venue	Zoom webinar with live Q&A
Fee	€186
Discounted* Fee	€160
CPD Hours	3 General (by Group Study)
Event Code	22000

Aim and Objectives

The aim of this seminar is to provide general practitioners with an overview of recent and on-going developments in probate, administration and taxation practice from a practical perspective. Topical issues of concern and interest will be covered in this comprehensive probate update. The seminar is designed in collaboration with STEP and the Taxation Committee and the Probate, Administration of Estates & Trusts Committee of the Law Society.

Topics and Issues to be covered

- General Probate update
- Tax update for the probate practitioner
- CRBOT update
- Will challenges

Chairperson

Barry Kennelly, Chairperson STEP

Speakers

John Cuddigan, Partner, Ronan Daly Jermyn, Cork.

John Cuddigan is Head of Ronan Daly Jermyn's Tax Practice and specialises in the provision of corporate and business tax advice to corporates and individuals. John has advised on all aspects of Irish direct and indirect taxation for companies and individuals and has significant experience in the areas of corporate restructuring, property transactions and restructuring, remuneration strategies and tax structuring of businesses in Ireland. He also has extensive experience in the areas of tax appeals and Revenue audits. John has lectured extensively and presented seminars on various tax matters for the Irish Tax Institute and the Law Society of Ireland and is incoming Chairman of the Taxation Committee of Law Society of Ireland. He was co-author of the Institute publication on the Irish Finance Act (FINAK) from 2008 to 2014. He is also a member of the taxation committee of the CCBE (Council of Bars and Law Societies of Europe).

Anne Marie Maher BL

Ann Marie Maher was called to the bar in 2006 and is a Junior Counsel with a specialist practice in Chancery Probate and Succession Law. Anne Marie has particular experience in dealing with claims for and against estates under the Civil Partnership and Certain Rights and Obligations of Cohabitants Act, 2010 ("the 2010 Act"). She has lectured on the Law Society PPC II course in the area of Wills, Trusts and Probate and on the Law Society/STEP Diploma in Wills, Trust & Estate Planning and on the Barrister-at-Law course at the Honourable Society of Kings Inns and has presented to the DSBA and other professional bodies on probate practice and the surviving rights of cohabitants under 2010 Act.

Aileen Keogan Keogan Law & Tax

Aileen Keogan Solicitor CTA STEP is the founder of Keogan Law & Tax www.klt.ie, a boutique private client legal and taxation firm. Her practice focuses on Irish succession planning both international and domestic, advising on estates, trusts and capital tax matters, in particular as consultant to solicitors and accountants and other tax advisers. Aileen has specialised in these areas for over 25 years. Aileen has published widely on estate and trust planning, including *The Law & Taxation of Trusts* (Keogan, Mee and Wylie, Tottels 2007) and the *Law of Capital Acquisitions Tax, Stamp Duty and LPT* (ITI annual publication) and the Wills section of *Laffoy's Conveyancing Precedents* (Bloomsbury, annual). She is an elected council director of the Irish Tax Institute, a Law Society of Ireland's Probate, Administration and Trusts Committee member, its representative at TALC, a committee member of STEP Ireland and its representative in STEP Europe.

Anne Stephenson, Principal Stephenson Burns Solicitors, Dublin, member Probate, Administration and Trusts Committee

Anne is a member of STEP, the Probate Committee of the Dublin Solicitors Bar Association and is the current Chair of the Probate Administration and Trusts Committee of the Law Society of Ireland. Anne has practised and taught law for more than 25 years. Anne lectures and tutors on the Law Society's PPCI. Anne is a co-founder and former vice president of Solicitors for the Elderly Ireland and is a co-author of three Oxford University Press books. In her practice, Anne has been retained by major financial institutions, private clients, and other professional legal and financial firms both within Ireland and overseas to provide advice and services in the areas of Wills, Trusts, Capital Taxes, Estate Planning, Probate, and the Administration of Estates.

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*Law Society Finuas Skillnet members