Date: Tuesday, 26 May 2026
Time: 10.00 – 13.00
Venue: Camden Court Hotel, Camden Street, Dublin 2 & Online
Speakers: Niall Fitzgerald, *Zurich*
Stephen Gillick, *Mason Hayes & Curran*
Kevin McConnell, *Gem Strategic*
Finola O'Hanlon, *O'Hanlon Tax Ltd.*

Programme:

Time	Topic	Speakers
09.00 – 10.00	Networking	
10.00 – 10.05	Opening Remarks with Emer Kirk, *FPSB Ireland*	

10.05 – 10.45	**Tax Implications for Retirees with Foreign Income and Assets**
	• Returning to Ireland to retire from abroad (including the UK and US):
	  ○ tax treatment of income and gains from assets located in Ireland and abroad and managing potential double tax
	  ○ actions to consider before returning to live in Ireland
	• Understanding the tax implications of the make-up of the retiree's asset portfolio:
	  ○ impact on the family's potential future exposure to foreign inheritance/estate taxes
	  ○ actions to consider
		Finola O'Hanlon, *O'Hanlon Tax Ltd*

10.45 – 10.55	**Q&A** with Finola and Emer	
10.55 – 11.35	**Auto-Enrolment in Practice: How AE Is Reshaping Ireland's Retirement & Advice Landscape** • Six months into Ireland's Auto-Enrolment (AE) rollout, its impact on employers, employees, and advisers is becoming clear, alongside emerging issues such as taxation queries and minimum-standards pressures. • Examination of evolving employer behaviours and new participation patterns across the market, with real-world insights into challenges and likely future developments as AE becomes embedded in the retirement landscape. • Moderated discussion on how advisers can effectively navigate this rapidly changing environment.	Niall Fitzgerald, *Zurich* & Stephen Gillick, *Mason Hayes & Curran*
11.35 – 11.45	**Q&A** with Niall, Stephen and Emer	
11.45 – 12.00	**Tea/Coffee Break**	
12.00 – 12.45	**Investing in the Current Economic Environment: Navigating Market Volatility and Rethinking Retirement Strategies** • Explore how current market volatility and economic uncertainty are influencing investor behaviour and financial decision-making. • Retirement readiness through a new lens.	Kevin McConnell, *Gem Strategic*
12.45– 12.55	**Q&A** with Kevin and Emer	
12.55 – 13.00	**Closing Remarks**	

Speakers

Niall Fitzgerald is Head of Retirement Solutions, Zurich. Niall has held a number of market facing roles during his 24 years with Zurich. Prior to joining Zurich, Niall worked for a number of years with as a Senior Pensions Consultant dealing directly with clients, employers and trustees. Niall has vast experience dealing with advisers and employers in all aspects of pension scheme provision. Recently he has been involved with analysing solutions for employers when it comes to the newly introduced auto enrolment legislation. He holds the QFA and RPA designation from the LIA, is an associate of the Irish Institute of Pensions Management and a Qualified Pension Trustee.

Stephen Gillick is a Partner and Head of the Pensions team at Mason Hayes & Curran. He has extensive experience advising on a range of pensions-related legal issues including pension scheme establishment and restructuring, and de-risking exercises. Stephen is experienced in drafting and updating pension scheme documentation and advising on pension scheme mergers and reorganisations. He regularly advises on the pension aspects of corporate acquisitions and disposals. Stephen has extensive experience of advising Trustees and Pension Scheme operators on the impact of cutting-edge legislation such as DORA and GDPR. He also has experience in advising various stakeholders on the likely positive and negative impact of AI on pension schemes in Ireland.

Kevin McConnell is Chief Executive of Gem Strategic, a specialist consultancy to financial institutions. Over a career spanning 30 years in capital markets, Kevin has worked as a strategic adviser to a range of global international institutions in the investment and banking industry, advising on capital, risk and strategy. He advises both European and North American financial institutions developing and testing capital resilience across ranges of economic and capital market scenarios/outcomes. Kevin also sits on the investment committee/board of a number of European financial institutions, in an active oversight role in investment strategy. He was, until recently, a member of the Advisory Committee of the Certified Investment Fund Director Institute and is a Senior Associate of Faculty, Institute of Banking Executive Education. Kevin is a Teaching Fellow in Wealth Management on the Masters in Finance, Trinity College Dublin and has lectured on Bank Capital & Risk in Cambridge University.

Finola O'Hanlon, O'Hanlon Tax Ltd, BCL, Solicitor, Chartered Tax Adviser (CTA) (Fellow), Trust and Estate Practitioner (TEP), specialises in the area of wealth management and advises on all taxes associated with retaining and passing wealth. This includes advising on the tax efficient structuring of wills and lifetime transfers of wealth to the next generation. As a tax solicitor she also provides advice on tax issues arising for conveyancers and provides a support service to accountants and lawyers. Before specialising in tax Finola worked as a solicitor, in general practice and with the Law Society.