**Financial Planning Standards Board Ireland**

**Approved CPD Events 2019**

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| **Date** | **Provider** | **Location** | **Time** | **FPSB CPD Hours** |
| 2019 | LIA MyCPD.ie module - Succession & Estate Planning IOB Myinstitute.iob.ie module – Succession & Estate Planning | Online Delivery | N/A | 2 Hours |
| 2019 | Irish Life WebinarRetirement Planning | Online Delivery | N/A | 1 Hour |
| 2019 | Society of Financial Planners Ireland WebinarSelling a Business & Private Equity Investing (Mark Flood)Tax Perspective on Selling and Business (Lisa Cantillon)Pension Perspective & Maximising Pension Benefits when selling a Business (Barry McDonald) | Online Delivery | N/A | 2 Hours |
| 2019 | CFA Level 1 2019 | CFA Institute |  | 8 Hours |
| 2019 | CFA Level 2 2019 | CFA Institute |  | 8 Hours |
| 2019 | CFA Level 3 2019 | CFA Institute |  | 8 Hours |
| 2019 | CFA Certification Exam 2019 | CFA Institute |  | 8 Hours |
| 2019 | MSc in Financial Services – Risk-based Financial Mgt. moduleLIA Code: LIA05564\_2019 | Dublin / Portlaoise | N/A | 8 Hours |
| 2019 | MSc in Financial Services – Business Economics moduleLIA Code: LIA05565\_2019 | Dublin / Portlaoise | N/A | 8 Hours |
| 2019 | MSc in Financial Services – Behavioural Decision-Making moduleLIA Code: LIA05566\_2019 | Dublin / Portlaoise | N/A | 8 Hours |
| Multiple Dates | Aviva Life & Pensions Ireland – Pension Update 2019 & Technical Issues (John McINerney)LIA Code: LIA04668\_2019 | Various Locations | N/A | 2 Hours |
| 22/01/2019 | Davy Select Partner Conference – Gary Connolly & Pat RyanIOB Code: 2019-1615LIA Code: LIA06309\_2019 | Davy House, Dawson Street,Dublin 2 |  | 2 Hours |
| 04/02/2019 | CFP® Certification ExaminationLIA Code: 06780\_2019 | Dublin/Portlaoise | 10.00am-1.30pm | 8 Hours |
| 05/02/2019 | LIA Seminar – Investment Update, Guiding Your Clients (Gary Connolly)Economic Update (Jim Power)IOB Codes: 2019-0297, 2019-0282 | Woodlands Hotel,Waterford. | 9.30am-11.30am | 2 Hours |
| 07/02/2019 | LIA CPD SeminarInvestment Update – Gary ConnollyEconomic Update – Jim PowerIOB Codes: 2019-0297, 2019-0282 | Maryborough Hotel & Spa, Cork | 9.30am – 11.30am | 2 Hours |
| 27/02/2019 | Portfolio Metrix IrelandAdvanced Estate Planning Seminar IOB Code: 2019-0883 | Clayton Hotel, Burlington Road, Dublin | 12.30pm-03.15pm | 3 Hours |
| 28/02/2019 | FinalytiQ – Abraham OkusanyaScience of Retirement Conference 2019 | Science Museum London | 09.00am-17.30pm | 3 Hours |
| 28/02/2019 | Irish Tax Institute (ITI) and Society of Trust & Estate Practitioners (STEP) Joint Seminar | Hilton HotelCharlemont Place, Dublin 2 | 8.30am – 12.30pm | 3 Hours |
| 04/03/2019 | LIA CPD SeminarInvestment Update – Guiding your Clients (Gary Connolly)Economic Update – Jim Power IOB Codes: 2019-0277, 2019-0282 | IMI Conference Centre,Sandyford,Dublin 16 | 5.00pm –7.00pm | 2 Hours |
| 04/03/2019 | LIA CPD Seminar – Effective Tax Planning for Business owners (David Clancy)Understanding business protection/Inc protection Update (Karen Gallagher) IOB Codes: 2019-0273, 2019-0285 | Maldron Hotel,Sandy Road,Galway | 3.00pm-5.00pm | 2 Hours |
| 04/03/2019 | LIA CPD Seminar – Effective Tax Planning for Business owners (David Clancy)Understanding business protection/Inc protection Update (Karen Gallagher)IOB Codes: 2019-0273, 2019-0285 | The Savoy Hotel,Henry Street,Limerick | 10.00am-12.00 | 2 Hours |
| 05/03/2019 | LIA Seminar – Legal Separation & Co-Habiting Couples (David Clancy)Investment Risks for the consumer (Shane O’Brien)IOB Codes: 2019-0274, 2019-0298 | Radisson Blu Hotel,Letterkenny,Donegal. | 3.00pm-5.00pm | 2 Hours |
| 05/03/2019 | Finance Act & Tax Magic Seminar 2019Finance Act Update/Succession Planning/Retirement Planning (Speakers: Alan Moore & James Caron)IOB Code: 2019-0481 | Dublin[www.taxworld.ie/events](http://www.taxworld.ie/events)  | 9.00am-12.30pm | 3 Hours |
| 07/03/2019 | Davy SeminarFinancial Planning for Business Owners – Brian Walsh & Barry KennellyIOB Code:2019-1365LIA code: LIA06072\_2019 | Davy House, Dawson Street,Dublin 2 |  | 3 Hours |
| 11/03/2019 | Finance Act & Tax Magic Seminar 2019Finance Act Update/Succession Planning/Retirement Planning (Speakers: Alan Moore & James Caron)IOB Code: 2019-0481 | Galway[www.taxworld.ie/events](http://www.taxworld.ie/events)  | 9.00am-12.30pm | 3 Hours |
| 11/03/2019 | Finance Act & Tax Magic Seminar 2019Finance Act Update/Succession Planning/Retirement Planning (Speakers: Alan Moore & James Caron) IOB Code: 2019-0481 | Limerick[www.taxworld.ie/events](http://www.taxworld.ie/events)  | 3.00pm-6.30pm | 3 Hours |
| 12/03/2019 | Finance Act & Tax Magic Seminar 2019Finance Act Update/Succession Planning/Retirement PlanningIOB Code: 2019-0481 | Cork[www.taxworld.ie/events](http://www.taxworld.ie/events)  | 9.00am-12.30pm | 3 Hours |
| 26/03/2019 | Society of Financial Planners Ireland Ltd (SFPI)Planning for Long Term care Needs – Fair DealIOB Codes: 2019-2192, 2019-1003 | The Red Cow Moran HotelDublin | 10.30am12.30pm | 2 Hours |
| 26/03/2019 | FPSB CPD Seminar IOB Code: 2019-1005 LIA Code: LIA05630\_2019 | Menlo Park Hotel,Terryland, Galway | 9.00am –11.00am | 2 Hours |
| 27/03/2019 | FPSB CPD SeminarIOB Code: 2019-1005 LIA Code: LIA05630\_2019 | Rochestown Park Hotel,Douglas, Cork | 9.00am –11.00am | 2 Hours |
| 28/03/2019 | FPSB CPD SeminarIOB Code: 2019-1005 LIA Code: LIA05630\_2019 | The Gibson Hotel,The Point Square, Dublin 1 | 9.00am –11.00am | 2 Hours |
| 28/03/2019 | Irish Association Of Pension Funds – Annual Investment Conference 2019 | The Convention CentreCCDDublin 1 | 8.30am – 1.15pm | 3 Hours |
| 08/04/2019 | LIA Seminar – Financial Planning: A Practitioner’s Perspective (Cleona Kinahan)Investment Update (Richard Temperley)IOB Codes: 2019-0271, 2019-0297 | Maldron Hotel,Sandy Road,Galway | 3.00pm-5.00pm | 2 Hours |
| 08/04/2019 | LIA CPD SeminarRetirement Income – How to Minimise (Kevin Fitzsimons)Managing Investment Risk – John CaslinIOB Codes: 2019-0289, 2019-0283 | IMI Conference Centre,Sandyford, Dublin 16 | 5.00pm –7.00pm | 2 Hours |
| 08/04/2019 | LIA Seminar – Financial Planning: A Practitioners Perspective (Cleona Kinahan)Investment Update (Richard Temperley)IOB Codes: 2019-0271, 2019-0297 | The Savoy Hotel,Henry Street,Limerick | 10.00am-12.00 | 2 Hours |
| 09/04/2019 | LIA Seminar – Tax Update & Planning (David Clancy)Retirement Income (Kevin Fitzsimons)IOB Codes: 2019-0275, 2019-0289 | Woodlands Hotel,Waterford. | 9.30am-11.30am | 2 Hours |
| 09/04/2019 | LIA Seminar – Pension Adjustment Orders (George Nolan)Business Protection/Key Man/Co Dir cover (Kate Connor)IOB Codes: 2019-0278, 2019-0288 | City North Hotel,Gormanston,Co. Meath | 8.30am-10.30am | 2 Hours |
| 10/04/2019 | LIA Seminar – Effective Tax Planning for Business Owners (David Clancy)Retirement Planning for Business (Suzanne O’Neill) IOB Codes: 2019-0273, 2019-0300 | Mullingar Park Hotel,Dublin Road,Mullingar | 3.00pm-5.00pm | 2 Hours |
| 01/05/2019 | Portfoliometrix Advanced Tax Planning SeminarIOB Code: 2019-0883 | Hilton HotelCharlemont Place, Dublin 2 | 12.30pm-4.00pm | 2 Hours |
| 13/05/2019 | LIA CPD SeminarUpdate Fin Servs & Pensions Ombudsman – (Ger Deering)Topical Tax Issues – Leaving Employment/Succession Planning (Laura Lynch) IOB Codes: 2019-0280, 2019-0290 | IMI Conference Centre,Sandyford,Dublin 16 | 5.00pm – 7.00pm | 2 Hours |
| 21/05/2019 | Davy SeminarFinancial Planning for Professionals and Executives – Brian Walsh & Barry KennellyIOB Code: 2019-1642LIA code: LIA06254\_2019 | Davy House, Dawson Street,Dublin 2 |  | 3 Hours |
| 24/05/2019 | Society of Trust & Estate Practitioners (STEP) Ireland Annual Conference 2019 -  | Hilton Hotel, Charlemont Place, Dublin 2 | 8.45am – 3.45pm | 4 Hours |
| 24/05/2019 | Markey Abuse – Understanding and Avoiding 2019 Simon Morris – CMS LLP | Davy HouseDawson St Dublin 2 |  | 1 Hour |
| 28/05/2019 | Smart Finance May Event 2019Speakers: Paula Downey & Gerard Keane | Red Cow HotelDublin | 10.30am – 12.30pm | 2 Hours |
| 11/06/2019 | FPSB/LIA/ITI Joint SeminarManaging Wealth in 2019 and BeyondLIA Code: LIA06007\_2019 IOB Code: 2019-1283 | Clayton Hotel,Galway | 8.00am-11.30am | 3 Hours |
| 12/06/2019 | FPSB/LIA/ITI Joint SeminarManaging Wealth in 2019 and BeyondLIA Code: LIA06007\_2019 IOB Code: 2019-1283 | Maryborough Hotel,Cork | 8.00am-11.30am | 3 Hours |
| 13/06/2019 | FPSB/LIA/ITI Joint SeminarManaging Wealth in 2019 and BeyondLIA Code: LIA06007\_2019 IOB Code: 2019-1283 | The Gibson Hotel,The Point Square,Dublin 1. | 8.00am-11.30am | 3 Hours |
| 15/06/2019 | CFP® Certification ExaminationLIA Code: 06780\_2019 | Dublin | 10.00am-1.30pm | 8 Hours |
| 17/07/2019 | Davy SeminarAn advocate for fundamental active (William Killeen)The futility of trying to beat Mr Market – the case for passive (Jan-Carl Plagge)The focus on Active v Passive is missing the point – the case for factor investing (Simon Landsorp)‘Di-worsification’ – active results are best achieved through concentration (Adam Mac Nulty)Winning the losers game – the case for diversified active equity (Mark Webster) | Davy House, Dawson Street,Dublin 2 | 9.45am-12.15pm | 2 Hours |
| 30/08/2019 | Economic and Investment Markets BriefingBernard Walsh | Bank of IrelandWealth AtriumCollege Green Dublin 2 | 8.00am – 9.30am | 1 Hour |
| 04/09/2019 | Bank of Ireland Sales ConferencePension Technical Update – George NolanPension Transfer Process – Tim CullenIOB Codes: 2019-2031, 2019-2049 | Hotel Kilkenny,College Rd, Sugarloafhill, Kilkenny | 8.30am- 5.00pm | 2 Hours |
| 09/09/2019 | LIA Seminar – The Impact on Financial Advice of changes to family structure (Muriel Walls)Pension Update (John McInerney)IOB Codes: 2019-0292, 2019-0284 | The Savoy Hotel,Henry Street,Limerick | 10.00am-12.00pm | 2 Hours |
| 09/09/2019 | LIA CPD Seminar – Pensions Update (John McInerney)The Impact on Financial Advice of changes to family structures (Muriel Walls)IOB Codes: 2019-0292, 2019-0284 | Maldron Hotel,Sandy Road,Galway | 3.00pm-5.00pm | 2 Hours |
| 10/09/2019 | LIA Seminar – Effective Tax Planning (David Clancy)Legal Separation & Co-Habiting couples (Keith Walsh)IOB Codes: 2019-0273, 2019-0274 | City North Hotel,Gormanston,Co. Meath | 8.30am-10.00am | 2 Hours |
| 10/09/2019 | Davy SeminarMy data’s bigger than yours – harnessing data for alpha generation – AQRNot all that counts, can be counted – the case for fundamental investing – Setanta Asset ManagementCan fundamental investors harness the benefits of AI? – JP MorganMarket Cycles – Enduring them or Managing them?The early bird – the case for managing them – Aviva InvestorsThe second mouse – the case for enduring them – Invesco/Source | Davy House,Dawson Street,Dublin 2 | 9.45am – 12.15pm | 2 Hours |
| 11/09/2019 | LIA Seminar – Understanding Public Sector & DB Schemes (John McInerney)Business Protection Update (Niall Concannon)IOB Code: 2019-0295 | Mullingar Park Hotel,Dublin Road,Mullingar. | 3.00pm-5.00pm | 2 Hours |
| 12/09/2019 | Davy SeminarFamily Partnership 2019 – Brain WalshIOB Code: 2019-2384LIA Code: LIA07134\_2019 | Dublin |  | 1 Hour |
| 19/09/2019 | LIA Seminar – Estate Planning (Kate Connor)Underwriting Update (Stephen Lane)IOB Codes: 2019-0287, 2019-0299 | Radisson Blu Hotel,Letterkenny. | 3.00pm-5.00pm | 2 Hours |
| 19/09/2019 | Society of Financial Planners – Annual ConferenceThe Science of Index InvestingIs Index Investing Hurting the Investment EcosystemThe RPC and the SFPI – how can we work togetherConsumer Protection & Financial PlanningIOB Code: 2019-2192 | Palmerstown HouseCo Kildare | 10am-4pm | 3 Hours |
| 25/09/2019 | RPA Practitioner Forum | Citywest HotelDublin  | 10am-1pm | 3 Hours |
| 01/10/2019 | Davy SeminarEngagement, ESG and Non-Financial Reporting: Risks and Opportunity 2019 – Sacha Sadan, Kurt Kuehn, Peter Reilly, Alan Brett, Brian Kennedy & Tom TynanIOB Code: 2019-2101LIA code: LIA06905\_2019 | Davy House, Dawson Street,Dublin 2 |  | 2 Hours |
| 03/10/2019 | Irish Association of Pension Funds – Annual Benefits Conference 2019 | Printworks Conference Centre, Dublin Castle, Dublin 2 | 8.30am – 1.00pm | 3 Hours |
| 14/10/2019 | LIA Seminar – The impact on Financial Advice of changes to family structure (Muriel Walls)Behavioural Economics – Investing & the price of emotional comfort (Andy Ivory-Corr)IOB Codes: 2019-0292, 2019-0269 | IMI Conference Centre,Sandyford,Dublin 16. | 5.00pm-7.00pm | 2 Hours |
| 14/10/2019 | LIA Seminar – Investment Update – Guiding Your Clients (Gary Connolly)Economic Update (Jim Power)IOB Codes: 2019-0277, 2019-0282 | The Savoy Hotel,Henry Street,Limerick. | 10.00am-12.00 | 2 Hours |
| 14/10/2019 | LIA CPD Seminar – Investment Update, Guiding your Clients (Gary Connolly)Economic Update (Jim Power)IOB Codes: 2019-0277, 2019-0282 | Maldron Hotel,Sandy Road,Galway | 3.00pm-5.00pm | 2 Hours |
| 15/10/2019 | LIA Seminar – Understanding Volatility & Standards Deviation (Andy Ivory-Corr)Business Protection/key man/co director cover (Kate Connor)IOB Codes: 2019-0270, 2019-0288 | Woodlands Hotel,Waterford. | 9.00am-11.00am | 2 hours |
| 15/10/2019 | LIA CPD Seminar – Investment Update, Guiding your Clients (Gary Connolly)Economic Update (Jim Power) | City North Hotel,Gormanston,Co. Meath | 8.30am-10.00am | 2 Hours |
| 16/10/2019 | LIA Seminar – Investment Update, Guiding Your Clients (Gary Connolly)Economic Update – Jim PowerIOB Codes: 2019-0277, 2019-0282 | Mullingar Park Hotel,Dublin Road, | 3.00pm-5.00pm | 2 Hours |
| 17/10/2019 | LIA CPD Seminar – Understanding Volatility & Standard Deviation – Andy Ivory-CorrIOB Code: 2019-0270 | Maryborough House – Cork | 9.30am – 11.30am | 1 Hour |
| 17/10/2019 | LIA Seminar – Investment Update, Guiding Your Clients (Gary Connolly)Economic Update (Jim Power)IOB Codes: 2019-0277, 2019-0282 | Radisson Blu Hotel**,**Letterkenny,Donegal | 3.00pm-5.00pm | 2 Hours |
| 24/10/2019 | Future of Pensions in Ireland Seminar – Patrick O’Shea & Eunice Dreelan (Irish Life) | Merrion Hotel, Dublin 2 | 3.00pm-5.00pm | 2 Hours |
| 07/11/2019 | Trust Structures 2019 Barry Kennelly | Davy HouseDawson StDublin 2 |  | 1 Hour |
| 21/11/2019 | FPSB Annual ConferenceLIA Code: LIA06995\_2019IOB Code: 2019-2422 | The Heritage Hotel, Killenard, Portarlington, Co. Laois | 9.30am –1.00pm | 3 Hours |
| 26/11/2019 | Let’s Talk Investments Conference 2019 – Conexim | Killashee Hotel, Fonthill Road, Naas, Co Kildare | 9.00am – 6.30pm | 4 Hours |
| 28/11/2019 | Personal Finance Society Annual Conference 2019Futureproof – Safeguarding your clients and your business | International Convention Centre,Birmingham,B1 2EA | 9.15am – 4.45pm | 3 Hours |
| 04/12/2019 | Sustainability & Business / ESG InvestingAli Sheridan & Laura Heuston – Sustainability Works | Davy House49 Dawson St, Dublin 2 | 12.30pm – 1.30pm | 1 Hour |
| 04/12/2019 | Humans Under Management | Royal College of Physicians,London | 9.00am – 5.30pm | 3 Hours |
| 09/12/2019 | Tax & Wealth Planning 2019 – Tax World | Green Isle Hotel, Dublin 22 | 9.30am – 6.30pm | 4 Hours |
| 12/12/2019 | Aberdeen Standard Investments 2019 Annual Conference | The Convention CentreDublin | 9.00am – 12.30pm | 3 Hours |