

XEINADIN TAX
STRATEGIC, PRACTICAL & PROACTIVE TAX ADVICE

Your trusted partner for tax, financial and business advice, at every stage of your journey.

Xeinadin Tax delivers practical, forward-thinking tax advice that helps clients protect wealth, improve cashflow and plan with confidence. We work proactively with business owners, individuals, families and professional advisors to identify opportunities, manage risk and support complex transactions.

Kildare Tax Team

Our local tax department is led by two Tax Partners, Patrick O'Rourke and Lisa Lokasto, both Chartered Accountants and Chartered Tax Advisors, and supported by a national tax team of over 50 specialists.

Xeinadin's tax advisory services are overseen nationally by Dave O'Brien, who brings together tax experts from across Ireland giving clients access to broad expertise with strong local leadership. Dave began his career with EY before joining Quintas in 2012, where he became Tax Advisory Partner, a role he held until Quintas was acquired by Xeinadin in 2023.

TAX ADVISORY SERVICES

Business Owners & Directors

We help business owners grow, protect and exit their businesses tax efficiently:

- Profit extraction (salary, dividends, pensions)
- Group structuring & reorganisations
- Succession & family transfers
- R&D tax credits & innovation incentives
- Holding company structures & exit planning (CGT reliefs)

Land & Property Transactions

Specialist advice for developers, investors and landowners:

- VAT on property & structuring
- Capital allowances & CGT planning
- Development structuring & land transfers
- Property refinancing & restructuring

TAX ADVISORY SUPPORT FOR SOLICITORS

We work closely with solicitors to help make sure transactions are fully tax optimised and tax compliant:

- Capital taxes (CGT, CAT & inheritance tax)
- Property & land structuring and VAT
- Business restructurings & transactions
- Probate, estate & succession planning
- Wealth succession planning and Trusts
- Pre- and post-transaction tax reviews

Individuals & Families

Long term planning for wealth preservation and generational transition:

- Personal tax & wealth structuring
- Owner-manager advisory & incorporations
- Family partnerships,
- Inheritance, succession & retirement planning
- Trusts & family structures
- Access to key reliefs: Entrepreneur, Retirement, Agricultural & Business Relief

Compliance & Risk

- Revenue audit support & disclosures
- Historic tax risk reviews
- VAT recovery opportunities

Our role is to support the legal team, assist with the tax elements, maximise reliefs and ensure transactions proceed smoothly and efficiently.

XEINADIN
OTHER COMPREHENSIVE ADVISORY SERVICES

XEINADIN FINANCIAL SERVICES (XFS)

Personal & Corporate Financial Planning

100% owned subsidiary of Xeinadin Group Limited (XGL) regulated by the Central Bank of Ireland. Our team of experienced financial advisors and professional specialists work together with the client to develop customised strategies. Our advisors provide expert guidance across all aspects of financial protection, planning and longterm security.

Personal Clients

- Mortgage Protection
- Personal Life Cover
- Income Protection
- Pensions & PRSAs

Corporate Clients

- Partnership Insurance
- Key Person Insurance
- Corporate Savings
- Executive & Corporate Pensions / PRSAs

XEINADIN CORPORATE FINANCE

Funding, Growth, Transactions & Strategic Advice

We support business owners and investors at every stage of the business lifecycle.

Our Services Include

- Business Valuations, Exits & Restructuring
- Funding Solutions – working with mainstream lenders, secondary lenders, Specialist & international financiers
- Equity Funding – venture capital, private equity & family offices

We Advise On

- Raising finance
- Management buy-outs & buy-ins
- Selling a business & exit planning
- Building or acquiring a business
- Strategic growth and restructuring options

XEINADIN COMPANY SECRETARIAL IRELAND

Corporate Secretarial & Compliance Services

Our Company Secretarial team provides essential compliance and governance support that underpins all of our advisory service lines while also offering a full suite of standalone corporate secretarial services for clients who require them.

Our Services Include

- Incorporation of Companies
- Routine & non-routine statutory compliance and filings
- Voluntary Strike-Offs
- Constitutional changes
- Share issues, redemptions & buy-backs
- Summary Approval Procedure (SAP) transactions

Contact us today and discover how our integrated advisory services can add real value.

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Partners: Patrick Sutton, Patrick O'Rourke, Ken Herbert, Lisa Lokasto, William Mulhern.

Directors: Conor Dillon, Sandra Clarke, Charanjit Dhillon (British). | The titles Partner and Director refer to employees of similar professional standing.