

## 2016 Private Placement Life Insurance & Variable Annuities Forum

### Presented by Informa

May 17–18, 2016

Henry Bregstein, global co-chair of the Financial Services practice, will co-present panel discussions on "Creating an IDF" at 9:10 a.m. on Tuesday, May 17 and on "What is the Investor Control Doctrine?" at 11:30 a.m. on Wednesday, May 18 at the 2016 Private Placement Life Insurance & Variable Annuities Forum. Henry's panel on May 17 will discuss the following topics related to creating an IDF:

- structure and market participants;
- diversification;
- documentation;
- distribution; and
- unexpected issues.

On May 18, Henry's panel will explore the following discussion topics in relation to the investor control doctrine:

- actual control—not exercising control over or influencing investment decisions;
- pre-arranged plan—there must not be a pre-arranged plan to make an IDF available or select any individual investment;
- information flow—no discussion as to the quality or rate of return of any investment or group of investments; and
- property interest or other rights—no legal, equitable, direct or indirect interest in any of the assets in which an insurance company is investing.

For more information, click [here](#).

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## CONTACTS

For more information, contact your Katten attorney or any of the following attorneys.



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