Katten

EVENT



Developments in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers

October 3, 2017

Katten will host a program on tax-efficient investing, structuring and portfolio allocation, and utilization of insurance dedicated funds (IDFs) and other private placement variable annuity (PPVA)/private placement life insurance (PPLI) products at 2:00 p.m. (ET) on Tuesday, October 3. Henry Bregstein, global co-chair of the firm's Financial Services practice, will moderate the discussion, and Katten participants will include Phil Tortorich, Private Client Services partner, as well as Trusts and Estates associate Jonathan Byer.

Panelists will discuss:

- Portfolio Construction and Tax-Efficient Investment Allocation
- Distribution and New Product Direction
- Illiquid: Structuring and US and Cross Border Tax Implications
- Integrating Tax Efficiency into estate Planning, US and Cross Border

The panel will also include speakers from program sponsors Crown Global, Lombard International, Mercury Capital Advisors, Prudential, SALI Fund Services and Zurich.

Additional speakers from AllianceBernstein, Partners Group, JPMorgan and Winton Group will be providing their insights.

For more information, please contact Michelle Robinson.

CONTACTS

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



Henry Bregstein
+1.212.940.6615
henry.bregstein@katten.com



Jonathan C. Byer
+1.212.940.6532
jonathan.byer@katten.com

Attorney advertising. Published as a source of information only. The material contained herein is not to be construed as legal advice or opinion.

©2026 Katten Muchin Rosenman LLP.

All rights reserved. Katten refers to Katten Muchin Rosenman LLP and the affiliated partnership as explained at katten.com/disclaimer.