Katten

EVENT

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

October 29, 2018

Katten will reprise its annual program "The Latest Evolution in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers" at 2:00 p.m. (ET) on Monday, October 29. This half-day, four-panel program will explore 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, cross border, estate planning and market developments. Henry Bregstein, global co-chair of the firm's Financial Services practice, will moderate the panels, and Katten participants will include Transactional Tax Planning partner Jill Darrow and counsel Robert Loewy, and Trust and Estates partners Ronni Davidowitz and Kathryn Von Matthiessen, along with panelists from, among others, Goldman Sachs, York Capital Management, Lombard International, FAP, SALI and Crown Global.

Henry, Kimberly Broder and Financial Services associate Sarah Adams will present the "Private Placement Life Insurance and Annuities – Advanced Basics" session as a part of the program.

CONTACTS

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

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