

# What Rising Private Equity Professionals Need to Know About Estate Planning and Investment Planning

**Presented by Katten and Summit Trail Advisors**

May 8, 2020

Katten and Summit Trail Advisors will present "What Rising Private Equity Professionals Need to Know About Estate Planning and Investment Planning" at 10:30 a.m. (CT) on Friday, May 8. Private Wealth partner Tye Klooster and associate Benjamin Lavin, along with Jonathan Nickow, CFA and CFP at Summit Trail Advisors, will review what up-and-coming private equity professionals need to consider when preparing a wealth transfer plan for their private equity interests. In particular, they will cover an introduction to estate and wealth planning and will take a close look at specific items to consider as an up-and-coming private equity professional.

[Click here for a link to the webinar recording](#)

---

## CONTACTS

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



**Tye J. Klooster**  
+1.312.902.5449  
[tye.klooster@katten.com](mailto:tye.klooster@katten.com)



**Benjamin Lavin**  
+1.312.902.5670  
[ben.lavin@katten.com](mailto:ben.lavin@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](https://katten.com/disclaimer).