

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



Benjamin Lavin

+1.312.902.5670

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.