

## 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](#)

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### CONTACTS

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



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