

STEP LatAm Conference: Building Knowledge Across Borders Advising Families Today and Tomorrow

Presented by Society of Trust and Estate Practitioners (STEP)

October 14–15, 2021

Private Wealth partners Kathryn von Matthiessen and Matthew Sperry will both present at the 2021 STEP LatAm Conference in Riviera Maya, Mexico.

Kathryn will present the "Biden and Company Change Rules; United States Tax Considerations for the LatAm Client" session on Thursday, October 14 at 4:00 p.m. The presentation will explore changes on the horizon for the US transfer tax system for non-resident individuals; the NRA status for tax purposes and US Situs rules. Additionally, she will provide a look forward at how these new tax rules affect wealth structuring and trust and estate planning professionals with LATAM clients.

Matthew will co-present the "Case Law: LatAm Families With Trusts Under Attack" session on Friday, October 15 at 11:10 a.m. The presenters will examine challenges common law trusts face and how they operate in practice. They will highlight case law jurisprudence regarding common law trusts established for LatAm families that faced challenges in court and will provide some "just in time" key learnings from these cases.

[STEP LatAm Conference](#)

CONTACTS

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



Kathryn von Matthiessen

+1.212.940.8517

kathryn.vonmatthiessen@katten.com



Matthew Sperry

+44 (0) 20 7776 7635

matthew.sperry@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.

©2025 Katten Muchin Rosenman LLP.

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