

9th Annual Tax-Efficient Investing Program

Presented by Katten

November 3–17, 2021

[Register for the 9th Annual Tax-Efficient Investing Program.](#)

Katten will present its 9th Annual Tax-Efficient Investing (TEI) Program, a four-part series of informative and collaborative virtual discussions, tailored for sophisticated investors, institutions, family offices, wealth advisors, distributors and alternative asset managers. Henry Bregstein, partner and chair of Katten's Alternative Products practice, will moderate each of the four sessions.

Session one, "Financing Premiums," will take place at 11:30 a.m. (ET) on Wednesday, November 3. Speakers including Private Wealth partner Kathryn von Matthiessen will discuss: Split-Dollar, Loan Regimes, Structured Financings, Cross-Border Issues, Qualified Plan Usage – Whole life, Universal, PPLI.

Session two, "Private Wealth – Current Concerns and Solutions," will take place at 11:30 a.m. (ET) on Thursday, November 4. Speakers will include Private Wealth partner Kathryn von Matthiessen, and Transactional Tax Planning chair Saul Rudo and partner Jill Darrow. Discussion topics will include Legislative Tax Update and Intergenerational Wealth Transfer.

Session three, "Comparative Use Cases," will take place at 11:30 a.m. (ET) on Tuesday, November 16. Speakers include Private Wealth partner Nicholas Heuer, and Transactional Tax Planning partners Glenn Miller and Todd Hatcher will cover topics including: Qualified Small Business Stock Opportunity Zones, Non-Resident Trusts, Blockers – US and Other, USVI and GACs/PPLI/PPVA.

Session four, "Institutional Investors" will take place at 11:30 a.m. (ET) on Wednesday, November 17. It will cover topics including: Pension Plans, Foundations, Insurance Companies, Sovereign Wealth Funds, Treaty and Non-US Treaty Investors – The Continuing Case for PPLI/GACs/IDFs.

[View and listen to the "9th Annual Tax-Efficient Investing Program" session one recording.](#)

[View and listen to the "9th Annual Tax-Efficient Investing Program" session two recording.](#)

CONTACTS

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