

Annual Katten Private Wealth and Fiduciary Seminar

Presented by Katten

September 22, 2022

Katten will present its annual Private Wealth and Fiduciary Seminar at 9:00 a.m. (CT) on Thursday, September 22, both in person and virtually. The full-day program, entitled "Advising UHNW Families After a Period of Unprecedented Change," will cover a wide range of topics and recent developments impacting planning for ultra high-net-worth (UHNW) families and their fiduciaries. Speakers will offer insight during multiple sessions touching on subjects such as:

- Recent tax law developments relating to trusts and estates
- Recent developments in trust and estate litigation
- Private trust companies and their use in domestic and international estate planning
- Qualified small business stock planning considerations
- Considerations when developing or expanding a family office
- Estate planning techniques in a rising interest rate environment
- Recent legislation affecting current business tax planning
- Tax and non-tax considerations when moving from one state to another

Speakers will include Mergers and Acquisitions partner Jeffrey Patt; Private Wealth partners David Allen, Michelle Canerday, Adam Damerow, Charles Harris, Nicholas Heuer, Tye Klooster, Louis Laski and Andrew McKay; Transactional Tax Planning chair Saul Rudo and partner Valentina Famparska; Private Wealth counsels Hadar Danieli and Lisa Lukaszewski; and Private Wealth associates Jeffrey Glickman, Benjamin Lavin, Maureen Mullen, Ellery Sever and Michael Sherlock.

Joshua Rubenstein, national chair of Katten's Private Wealth practice, will deliver a keynote luncheon address that will discuss strategies for modifying wills and trusts after formation.

CONTACTS

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



David M. Allen

+1.312.902.5260

david.allen@katten.com



Adam M. Damerow

+1.312.902.5250

adam.damerow@katten.com



Valentina Famparska

+1.312.902.5451

valentina.famparska@katten.com



Charles Harris

+1.312.902.5213

charles.harris@katten.com



Nicholas J. Heuer

+1.312.902.5549

nicholas.heuer@katten.com



Tye J. Klooster

+1.312.902.5449

tye.klooster@katten.com



Louis A. Laski

+1.312.902.5607

louis.laski@katten.com



Benjamin Lavin

+1.312.902.5670

ben.lavin@katten.com



Lisa Lukaszewski

+1.312.902.5628

lisa.lukaszewski@katten.com



Andrew L. McKay

+1.312.902.5315

andrew.mckay@katten.com



Jeffrey R. Patt

+1.312.902.5604

jeffrey.patt@katten.com



Joshua S. Rubenstein

+1.212.940.7150

joshua.rubenstein@katten.com



Saul E. Rudo

+1.312.902.5664

saul.rudo@katten.com



Michael L. Sherlock

+1.312.902.5643

msherlock@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.