



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

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