Katten

FIRM EVENT

10th Annual Tax-Efficient Investing Forum

Presented by Katten

November 9, 2022

To learn more or register, contact Marlene Shepherd.

Katten will present its 10th Annual Tax-Efficient Investing Forum, a program tailored for sophisticated investors, institutions, family offices, wealth advisors, distributors and alternative asset managers. This year's program will be presented on Wednesday, November 9 in a hybrid format, both in Katten's New York offices and virtually via Zoom, and will feature a variety of speakers from Katten and our sponsors, among others.

Moderated by Katten's industry-leading authority and Alternative Products chair, Henry Bregstein, the topics will include tax-efficient investing, including insurance-dedicated funds and separately managed accounts (IDFs/ID-SMAs), private placement variable annuities (PPVA) and life insurance (PPLI) products, asset manager and investment strategy allocation, family office structuring, and more.

Panel one, "Family Office — Tax-Efficient Structuring & Investing," will take place at 1:00 p.m. (ET). Speakers including Private Wealth partner Nicholas Heuer and Transactional Tax Planning chair Saul Rudo will discuss: tax-efficient structuring of a family office; asset location considerations; PPLI/PPVA Utilization; and Succession Planning.

Panel two, "Tax Update — Income & Estate, Cross Border, Treaty Implications, State Expatriation," will take place at 1:55 p.m. (ET). Speakers will include Transactional Tax Planning partner Jill Darrow and Private Wealth partner Kathryn von Matthiessen. Discussion topics will include federal income tax; sunsetting of current Gift and Estate Taxes in 2025; Wyden PPLI Hearings — focus and meaning; State Pass-Through Entity Tax Regimes; carried interest: a cloudy future; and cryptocurrencies and other digital assets.

Panel three, "Distribution Roundtable — PPLI/PPVA Products & Best Practices," will take place at 3:45 p.m. (ET). Speakers will include Investment Management and Funds co-chair Allison Yacker and will cover topics including: differences; structuring; private equity, closed end and evergreen structures; iCOLI, BOLI, non-US investors; and wealth advisors/RIAs.

Panel four, "ID-SMAs & IDFs — Differences, Structuring, Use Cases & Opportunities" will take place at 11:30 a.m. (ET). 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.

Panel five, "Manager Forum-Insights, Strategy Growth, Opportunities" will take place at 4:30 p.m. (ET). It will cover topics including: economic views and strategy impacts; new strategies; and capital flows.

View the 10th Annual Tax Investing Forum agenda for updated schedule and speaker list.

CONTACTS

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