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

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



Jill E. Darrow
+1.212.940.7113
jill.darrow@katten.com



Henry Bregstein
+1.212.940.6615
henry.bregstein@katten.com

Nicholas J. Heuer
+1.312.902.5549
nicholas.heuer@katten.com





Saul E. Rudo
+1.312.902.5664
saul.rudo@katten.com

Kathryn von Matthiessen
+1.212.940.8517
kathryn.vonmatthiessen@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.