Katten

FIRM EVENT



11th Annual Tax-Efficient Investing Forum

Presented by Katten

September 13, 2023

Katten will present its 11th Annual Tax-Efficient Investing Forum on Wednesday, September 13, 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 program will include discussions on tax-efficient investing (TEI), 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.

At 1:50 p.m., Investment Management and Funds co-chair Allison Yacker will speak on the "PPLI/PPVA — Use Cases & Opportunities, Structuring Trends" panel, with discussion topics including:

- Institutional Investors — iCOLI, BOLI, & Non-US Investors (Treaty/Non-Treaty & Section 892)
- Wealth Advisors/RIAs
- Private Equity, Closed End & Evergreen Structures

At 3:25 p.m., Transactional Tax Planning partner and chair Saul Rudo and partner Jill Darrow will speak on the "Family Office — Tax-Efficient Structuring & Investing" panel, discussing topics including:

- Tax-Efficient Structuring of a Family Office
- Tax Update
- PPLI/PPVA Utilization
- AI/Cyber Concerns

At 4:15 p.m., Private Wealth partner Kathryn von Matthiessen will speak on the "Distribution Roundtable — PPLI/PPVA Products & Best Practices." Discussion topics will include:

- Best Practices
- ID-SMAs and Investor Control
- Democratization of PPLI
- Role of Insurance Companies
- Investor Concerns & Trends

To learn more, contact Sami Altshul.

Register for the 11th Annual Tax-Efficient Investing Forum.

CONTACTS

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



Henry Bregstein
+1.212.940.6615
henry.bregstein@katten.com



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

Jill E. Darrow
+1.212.940.7113
jill.darrow@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.