



12th Annual Tax-Efficient Investing Forum

Presented by Katten

September 12, 2024

Katten will present its 12th Annual Tax-Efficient Investing Forum beginning at 12:30 p.m. on Thursday, September 12, moderated by Katten's industry-leading authority, Alternative Products Chair Henry Bregstein. It will feature Katten panelists including Private Wealth Partners David Allen and Kathryn von Matthiessen, and Financial Markets and Funds Associate Elise Michael, as well as outside speakers who will cover topics that are newsworthy and top of mind, such as:

- Invaluable Inside IDF Manager Information
- Tax and Regulatory Update
- Tax Efficient Portfolio Construction
- Distribution of Tax Efficient Investments, and
- An Asset Management AI Conversation With Fabrizio Gallo and Ruggero Gramatica, Founders of Insightmill

To view the agenda, please [click here](#).

To learn more, contact [Sami Altshul](#).

CONTACTS

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



Henry Bregstein

+1.212.940.6615

henry.bregstein@katten.com



David M. Allen

+1.312.902.5260

david.allen@katten.com



Kathryn von Matthiessen

+1.212.940.8517

kathryn.vonmatthiessen@katten.com



Elise W. Michael

+1.212.940.6610

elise.michael@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.

©2025 Katten Muchin Rosenman LLP.

All rights reserved. Katten refers to Katten Muchin Rosenman LLP and the affiliated partnership as explained at katten.com/disclaimer.