

IPI Fall Investment Forum

Presented by the Institute for Private Investors (IPI)

September 11-12, 2025

Transactional Tax Planning Partner Valentina Famparska and Private Wealth Partner Abby Feinman will present "Plan Smarter: Estate & Tax Strategies for a Shifting Legislative Landscape" at 11:10 a.m. on Thursday, September 11, during the IPI Fall Investment Forum.

In this timely session, with sunset provisions and shifting tax policy on the horizon providing cause to reevaluate long-term planning strategies, they will break down five critical considerations for estate and gift planning, and five essential moves on the income tax side — all tailored to the complexities faced by ultra-wealthy families. From optimizing gifting structures to rethinking trust strategies, and navigating income tax and SALT, the session will offer a clear, actionable framework for UHNW families.

[Learn more about the IPI Fall Investment Forum.](#)

CONTACTS

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