Katten

EVENT

13th Annual Tax-Efficient Investing Forum

Presented by Katten

September 9, 2025

Katten will present its 13th Annual Tax-Efficient Investing Forum beginning at 12:30 p.m. on Tuesday, September 9, moderated by Katten's industry-leading authority, Alternative Products Chair Henry Bregstein. It will feature Katten panelists including Financial Markets and Funds Partner Elise Michael and Counsel Adam Bolter, Private Wealth Partner David Allen, and Transactional Tax Planning Partner Loren Lembo, as well as outside speakers who will cover topics that are newsworthy and top of mind, with topics including:

- IDF Manager Forum I — Across the Credit Strategy Spectrum
- Tax and Regulatory Update — Almost Everything Individuals, Family Offices, Pension Plans, Insurance Company Investors, Investment Managers and Non-US Persons Need to Know
- Asset Location — Critical Return Optimization Beyond Asset Allocation through PPLI, PPVA, Trusts, Situs and Strategies
- Accessing and Distribution of Tax Efficiency
- IDF Manager Forum II — Across the Broader Spectrum

To learn more, contact Sami Altshul.

CONTACTS

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