

Family Business Through a Legal Lens

Presented by Loyola University Chicago's Family Business Center

April 21, 2026

Katten will host Loyola University Chicago's Family Business Center for the "Family Business Through a Legal Lens" program on Tuesday, April 21, from 8:15 a.m. to 4:30 p.m. The program will feature interactive discussions on top concerns, with several Katten speakers participating.

Private Wealth Partner Adam Damerow will provide a welcome address and introductions at 8:30 a.m., as well as a closing Q&A at 2:55 p.m. At 8:35 a.m., he and Entrepreneurial Ventures Partner Jeffrey Patt will speak on the "Transition Playbook: When the Founder or Controlling Owner Dies." The panel addresses the critical two-to-three-year period following a founder's death, providing a roadmap for navigating estate administration, business continuity and family dynamics — even when planning was minimal.

At 9:25 a.m., Transactional Tax Planning Partner and Chair and Family Office Co-Chair Saul Rudo will speak on "Tax Playbook: Pivoting Your Business To Maintain Compliance." Tax legislation continues to evolve, and the panel will give perspective on how one manufacturing company stays compliant despite increased and evolving tariffs, an overhauled government procurement system and knowing that new legislation can drop at any time.

At 10:25 a.m., Private Wealth Associate Michael Sherlock will speak on "Acquisition Playbook: Building a New Portfolio After the Exit." The panel will share the strategic framework for evaluating opportunities, structuring transactions, conducting targeted due diligence, and maintaining family business culture across a growing portfolio — providing a roadmap for families considering growth through acquisition.

At 11:15 a.m., Jeff Patt will also speak on the "Governance Playbook" panel, addressing the unique dynamics of a family business, the application of general principles of corporate governance and how to use these same principles to derisk the business and contribute to planning.

At 12:15 p.m., Corporate Partner, Deputy General Counsel and Chief Privacy Officer Christina Grigorian will speak on "AI & Ethics Playbook: Leading Responsible AI Adoption." The panel will provide frameworks for evaluating AI tools, implementing protocols that satisfy professional obligations under the Rules of Professional Conduct, and advising leadership on realistic strategies that position an organization at the forefront of innovation.

At 1:15 p.m., Employee Benefits and Executive Compensation Partner Meredith O'Leary will speak on the "Non-Family Playbook: Compensation, Legal Operations & Retention Strategies" panel, exploring creative compensation structures, efficient legal operations models, and strategies that balance competitive talent management with family ownership preservation.

At 2:05 p.m., Private Wealth Partner Nicholas Heuer will speak on the "Private Trust Companies & Family Office Playbook: Taking Control of Multi-Generational Wealth Management" panel, discussing how families can take advantage of either family offices, private trust companies, or both — customizing trust administration, integrating wealth management with business operations, and establishing governance frameworks that serve multiple generations. The panel will provide a roadmap for evaluating whether this structure serves families' goals, and for implementing it successfully, from regulatory compliance to operational integration.

[Learn more about the program and find registration information.](#)

CONTACTS

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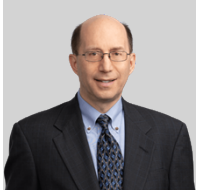
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