Katten

SPEAKING ENGAGEMENT

STEP Chicago 2nd Annual Conference

Presented by STEP

July 16, 2026

Katten will host STEP Chicago's 2nd Annual Conference on Thursday, July 16, with several Katten attorneys speaking on panel discussions.

At 10:30 a.m., Private Wealth Partner David Allen will moderate, and Private Wealth Partner and Global Chair Joshua Rubenstein will serve as a panelist, on "Guarding the Golden Years: Navigating Capacity, Scams, and the Art of Protecting Vulnerable Clients." The panel will bring together leading practitioners to discuss the threat of financial exploitation, undue influence and romance scams that aging Americans face. Panelists will share frontline strategies for drafting abuse-resistant documents, recognizing red flags of diminished capacity, and ethically navigating the complex attorney-client relationship when a client's judgment may be compromised.

At 11:45 a.m., Josh will present the "Planning for the Modern Family" session.

At 3:45 p.m., Private Wealth Partner Nicholas Heuer will speak on "Ethical Fault Lines in Modern Private Wealth Representation." The program will examine real-world ethical dilemmas facing trusts and estates counsel, including secret communications from individual family members, joint representation risks, fiduciary versus beneficiary tensions, and the unique complications created by international families and family office governance structures.

Learn more about the STEP Chicago 2nd Annual Conference.

CONTACTS

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