

14th Annual Tax-Efficient Investing Forum

September 9, 2026

Katten will present its 14th Annual Tax-Efficient Investing Forum beginning at 12:30 p.m. (ET) on Wednesday, September 9, moderated by Katten's industry-leading authority, Alternative Products Chair Henry Bregstein. It will feature Katten panelists Transactional Tax Planning Partner Todd Hatcher, Private Wealth Partner David Allen and Financial Markets and Funds Partner Elise Michael, along with other leading industry speakers.

The Forum will cover timely, newsworthy topics, including practical approaches to income tax optimization and developments affecting private placement life insurance (PPLI), private placement variable annuities (PPVA), insurance dedicated funds (IDFs) and insurance dedicated separately managed accounts (ID-SMAs). It will also address the evolving competitive landscape for investment managers and the opportunities and challenges presented by expanding access to tax-efficient investment strategies.

Designed for investors, family offices, wealth advisors, asset managers, insurance carriers and tax professionals advising high-net-worth clients, this Forum offers a focused opportunity to explore sophisticated tax-efficient strategies in a rapidly evolving market. As income tax considerations move to the forefront of planning for high-net-worth families, the program provides essential insights and practical perspectives.

Program highlights include:

- Opportunities for Tax Efficiency — PPLI/PPVA and Beyond
- IDF Manager Forum I — Continuing Success Driving New Entrants
- ID-SMAs — Beyond the Inflection Point: Investor and Advisor Opportunities
- IDF Manager Forum II — Continuing Success: Distribution and Access

[View Current Agenda.](#)

[Register here](#) or contact [Kristen Sidebottom](#) at Katten with questions.

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