Katten

SPEAKING ENGAGEMENT

ABA Virtual 2026 Fall Tax Meeting

Presented by the American Bar Association (ABA)

October 5–9, 2026

Katten Private Wealth Partners, Nicholas Heuer and Jonathan Byer, will join fellow estate planning practitioners, to present two sessions at the ABA Virtual 2026 Fall Tax Meeting from Monday, October 5, through Friday, October 9. Their sessions will examine the compliance and ethical challenges facing today's wealth planning practice, from US federal income tax reporting for offshore assets and trusts, to the responsible use of artificial intelligence (AI) in estate planning.

On Tuesday, October 6, 2026, Nicholas will speak during the session, “Staying Compliant with Global Assets and Interests" from 1:15 to 2:00 p.m. (ET). Global mobility and jurisdictional diversification of assets have made it more common for US persons to own offshore assets or to serve as beneficiaries of offshore trusts. Yet many do not fully understand the US federal income tax compliance obligations associated with offshore assets and trusts. This presentation will provide an overview of a citizen's US federal income tax reporting obligations associated with offshore assets and offshore trusts, practical considerations for gathering information to meet those obligations in a timely manner and how to correct historical noncompliance.

On Thursday, October 8, 2026, Jonathan will speak during the session, “Prompting Problems: AI, Professional Judgment, and Estate Planning Ethics” from 10:30 to 11:15 a.m. (ET). During the session, Jonathan will discuss how attorneys and clients are increasingly looking to leverage AI to optimize their planning and maximize efficiency. Attorneys (and their firms) must consider many practical and ethical issues regarding the use of AI. The panelists will explore how the use of AI implicates the model rules of ethics and will discuss the practical applications of those rules across their estate planning practices.

Learn about the ABA Virtual 2026 Fall Tax Meeting.

CONTACTS

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