Katten

EVENT



2026 Private Wealth and Fiduciary Seminar New York

Passing It On: Planning for the Great Wealth Transfer

November 4, 2026

Katten will present its 2026 Private Wealth and Fiduciary Seminar New York, “Passing It On: Planning for the Great Wealth Transfer,” beginning at 10:15 a.m. (ET) on Wednesday, November 4. Private Wealth Partner Parker Taylor will open the program where Katten's Private Wealth attorneys, including Private Wealth Global Chair Joshua S. Rubenstein, will lead insightful panels.

The event will cover timely topics, including Qualified Small Business Stock (QSBS) planning, diminishing capacity and undue influence, advanced drafting strategies and recent legislative and judicial developments affecting trusts and estates. It will also address advanced charitable planning for complex business interests and cross-border and offshore trust planning amid global and political change.

Designed as a dialogue with leading practitioners and advisors, this seminar offers a focused opportunity to explore the evolving considerations shaping how high-net-worth individuals and families plan for, protect and transfer wealth. As families navigate an increasingly complex planning landscape, the program provides timely insights into legal developments, sophisticated planning strategies and emerging issues affecting the transfer of wealth across generations.

Learn more about the 2026 Private Wealth and Fiduciary Seminar New York.

CONTACTS

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