

2025 Katten Private Wealth & Fiduciary Seminar Chicago

Timeless Planning & Administration Considerations in Any Exemption Environment

Thursday, October 30, 2025 | Katten Muchin Rosenman LLP

8:00–9:00 a.m. **BREAKFAST AND REGISTRATION**

9:00–9:05 a.m.

Welcome and Introduction



Adam Damerow

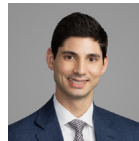
9:05–9:55 a.m.

Recent Developments/New Tax Law

In this session, the speakers will discuss recent case law, statutory law and IRS rulings relating to trusts and estates.

Topics include:

- Important case law and IRS rulings concerning transfer taxation and planning techniques
- Important new statutory law relating to trusts and estates
- Other recent developments and hot topics impacting private wealth advisers



Benji Lavin



Katie Keating



Brianna Garland

9:55–10:45 a.m.

Running the Family Meeting

In this session, we'll explore how advisors and fiduciaries can design and lead family meetings during any and all periods of the client engagement life cycle. Whether it is an initial meeting with new clients, or a full family meeting with actively engaged lower generations, we will explore key tips to make the most of any meeting — and provide anecdotes of just how impactful a successful meeting can be. Attendees will leave with practical tools and a flexible framework they can apply across a wide range of family profiles and planning contexts.

Topics include:

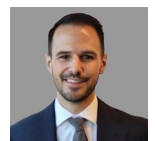
- How to structure and facilitate an initial family meeting with new clients to establish purpose, participation and process



David Allen



Jeff Glickman



Andrew Prunty

- Strategies for integrating the next generation into family meetings, including age-appropriate involvement and managing evolving dynamics
- Tools for designing meeting agendas that align legal, tax and governance priorities with family values and long-term goals
- Techniques for navigating sensitive topics — such as control, fairness and liquidity — without derailing the conversation
- Best practices for running ongoing family meetings that promote continuity, accountability and adaptive governance over time

10:45–10:55 a.m. **BREAK**

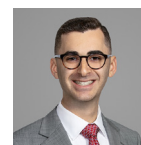
10:55–11:45 a.m.

Green Means “Go”

In this session, the speakers will discuss the nuances surrounding US estate, gift and income tax planning with a client who holds a “green card.”



Nicholas Heuer



Zachary Arons

Topics include:

- Providing guidance on US estate planning considerations and their implications, including the concept of “domicile” and typical A-B planning
- Assessing US gift tax rules that should be accounted for and their potential overlap with US estate planning
- Analyzing relevant US income tax principles that apply, including expatriation and US income tax treaties

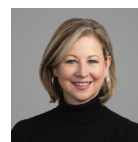
11:45 a.m.–12:35 p.m.

Probate Potpourri

In this session, the speakers will discuss various issues they are seeing in the trust and estate administration space, including relevant case law, issues stemming from audits and portability elections, as well as creating flexibility during the trust administration process.



Lisa Lukaszewski



Kelli Plotz



Caitlin Kelly

Topics include:

- Discussion of current case law and recent developments in the estate and trust administration world
 - What’s happening at our desks — highlighting updates to the federal Form 706 and its instructions, Form 8971, and Illinois Form 700, and how these changes affect our practice, as well as recent issues defended in Illinois and federal tax audits and portability considerations.
 - Keys to creating flexibility during this administration (specifically the various ways to accomplish trust reformation/modification)
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12:35–12:55 p.m. **BREAK** (20 minutes)

12:55–1:45 p.m.

KEYNOTE LUNCH:

Pressing the “Do Over” Button: Strategies for Modifying Wills and Trusts After Formation



Josh Rubenstein

This session will examine federal and state tax considerations in determining whether, and if so how, to modify wills and trusts after their formation. It will explore modification options with retroactive effect to the date of creation, as well as those that apply only prospectively. The session will conclude with a discussion of the use of litigation settlements as a means of implementing critical modifications to wills and trusts.

1:45–2:35 p.m.

Practical Applications of Artificial Intelligence in Estate Planning

In this session, the speakers will discuss the evolving role of artificial intelligence (AI) in estate planning. The panel will explore how lawyers and other advisors are integrating AI tools into their workflows, the potential benefits and efficiencies these technologies can offer and the ethical and practical considerations that come with their use. Through a moderated discussion, panelists will share real-world experiences, offer practical tips and highlight both promising opportunities and important limitations of AI in estate planning.

Topics include:

- Practical use cases and efficiencies gained from AI in estate planning
- Tips, tools and emerging technologies practitioners are using
- Ethical, legal and practical considerations when leveraging AI



Andrew McKay
(moderator)



Jack Bradley



Sally Venverloh
Managing Director,
Wealth Advisor
J.P.Morgan Private Bank



Moshe Bass, CPA
Partner
Prosperity Partners

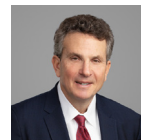
2:45–3:35 p.m.

Business Income Tax Planning in Light of the Big Beautiful Bill

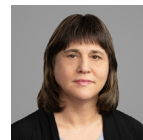
In this session, the speakers will discuss income tax planning strategies in connection with investments in, and acquisitions and dispositions of, businesses, with a focus on how current legislative developments, particularly the “Big Beautiful Bill” (OBBA), may impact planning decisions.

Topics include:

- Certain Provisions of the OBBA
- Investing in a Portfolio Company
 - Choice of Entity
 - Qualified Small Business Stock (“QSBS”)
- Exit Transactions
 - Strategic Alternative Transactions
 - Timing Considerations for Transitions
- Preparing for a Transaction
- Structuring an Exit Transaction
- Tax Deferral of Gain from Exit Transactions
 - Tax-Deferred Rollovers
 - Qualified Opportunity Zone (“QOZ”) Planning
 - Installment Sales



Saul Rudo



Valentina Famparska

3:35–4:25 p.m.

What I Know Now That I Wish I Knew Then – Adventures in Single Family Office Startups

In this session, the speakers will discuss and interview family office executives to pinpoint tactical tips and lessons learned regarding family office startup issues ranging from family roles and governance, structure issues, and family dynamics.

Topics include:

- Family Office startup issues, including pain points and recommendations.
- Tactical solutions for family office principals, executives, and advisors.
- Family office governance and structure.



Tye Klooster



Michael L. Sherlock



Michael L. Peska
Chief Operating Officer
M4J2 LLC



Christopher L. Hughes
Managing Principal and
Chief Investment Officer
Cypress Holdings Group, LLC



Jim Piszczek
Head of Family Office
Atacama Management, LLC

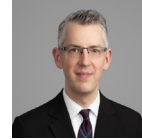
4:25–5:15 p.m.

Arc of Estate and Business Planning for Family Business Owners

In this scenario-based presentation, the panelists will explore common estate planning, wealth transfer, and corporate evolutionary “Arcs” encountered throughout a person’s life.

Topics include:

- The Arc of the testamentary estate plan
- The Arc of transfer tax planning (gift, estate and GST)
- The Arc of additional planning considerations faced by most families
- The Arc of business and succession planning



Adam Damerow



Jon Kohl



Michael L. Sherlock

5:15 p.m.

Networking Reception