



2019 Family Office Tax Roundtable

October 17 | Chicago, IL

Time	Activity/Topic	Speakers
8:00 – 8:45 am	Breakfast and Registration	
8:45 – 9:00 am	Welcome and Introduction	
9:00 – 9:45 am	2019 Income and Transfer Tax Update	Richard L. Dees Gary C. Karch
9:45 – 10:45 am	Residency and Other Recent State Tax Developments Related to Trusts	Carol A. Harrington Mary Kay McCalla Martire
10:45 – 11:00 am	Break	
11:00 – 11:45 am	Tax Planning Using Special Allocations in Partnerships	Patrick J. McCurry Thomas P. Ward
11:45 am – 1:00 pm	Luncheon Presentation – Recent Issues in Valuation and Discounts	L. Timothy Halleron Victoria Pambianco Ose
1:00 – 1:45 pm	Tax Primer on Financial Products for Family Offices	Andrea S. Kramer William R. Pomierski
1:45 – 2:30 pm	Qualified Opportunity Zones	Michael J. Bruno Pejman Razavilar
2:30 pm	Closing Remarks	