



2022 Family Office Tax Roundtable

October 20 | 8:00 AM – 2:30 PM CT

Time	Activity/Topic	Speakers
8:00 am – 8:45 am	Breakfast & Registration	
8:45 am – 9:00 am	Welcome Remarks	Thomas P. Ward
9:00 am – 9:45 am	Current Developments: Income & Transfer Tax	Gary C. Karch Adam K. Sherman
9:45 am – 10:45 am	Creative Ways to Fortify & Supercharge Family Multigenerational Structures	Todd Angkatavanich Bobbi J. Bierhals
10:45 am – 11:00 am	Break	
11:00 am – 11:45 am	Technical Income Tax Considerations in Current Family Office Planning	Patrick J. McCurry Thomas P. Ward
11:45 am – 1:00 pm	Networking Lunch	
1:00 pm – 1:45 pm	Taxing Tokens: Navigating the Digital Asset Winter	James H. Cundiff Elise J. McGee
1:45 pm – 2:30 pm	State Tax Update: Remote Workforce Issues; PTE Taxes & Investment Partnerships / Trust Residency Considerations	Fred M. Ackerson Catherine A. Battin
2:30 pm	Closing Remarks	Thomas P. Ward

**Subject to change*