



# 2021 Family Office Tax Roundtable

Thursday, October 21, 2021 | 11:00 am – 1:30 pm CDT

Time	Activity/Topic	Speakers
11:00 am – 11:01 am	Welcome Remarks	Thomas P. Ward
11:01 am – 11:45 am	The New Legislative Landscape	Gary C. Karch Richard L. Dees
11:45 am – 12:00 pm	Break	
12:00 pm – 12:45 pm	Family Office Income Tax Planning in a Changing Regulatory Environment	Lindsay Heyen Patrick J. McCurry Thomas P. Ward
12:45 pm – 1:30 pm	The Impact on Wealth Transfer Planning Strategies & Structures	Melissa Moszkowski Price Adam K. Sherman L. Timothy Halleron
1:30 pm	Closing Remarks	Thomas P. Ward