Gresham

Kim Kamin Presents on Estate Planning Considerations for the Modern Family and Other Timely Estate Planning Topics

December 1, 2019 —Kim Kamin, Gresham Partners' Chief Wealth Strategist and also editor and co-author of *Tools & Techniques of Estate Planning for Modern Families* (3rd Edition, 2019), has made several presentations based on material in this up-to-date guide for estate planners.

Her presentations addressed the numerous estate planning challenges that ultra-high net worth families and their advisors must now consider as the traditional nuclear family is no longer the presumption. These challenges are a result of multiple demographic changes, including same-sex marriages, blended families, cohabitation and different paths to parenthood that go well beyond adoption.

Presentations in 2019 on this popular topic included:

- The ALI-CLE National Audio Webcast, held on January 30th and the ALI-CLE Planning Techniques for Large Estates Event, held on April 4th in Scottsdale;
- The Family Office Exchange's Senior Management Council Event, held on March 1st in Fort Lauderdale, and The Family Office Exchange's Family Office Forum, held on July 17th in Chicago;
- The National Association of Personal Financial Planners Event, held on October 2nd in Chicago; and,
- The Chicago Estate Planning Council's Estate Planning Workshop, held on October 23rd in Chicago.

Additionally, Kim participated in the following panels that addressed several timely estate planning topics:

- *Playing the Disclaim Game: Accessing Optionality in Planning and Problem-Solving* at the 53rd Annual Heckerling Institute on Estate Planning, held on January 17th in Orlando.
- *Whose Will Is It: Does the Settlor's Intent Matter* at the American College of Trust and Estate Counsel's Annual Meeting on March 1st in La Quinta, CA;
- *Leveraging Your Voice – Rising Gen Empowerment in Family Philanthropy, Business and Trust Matters* at the Nexus Global Summit on July 26th in New York City; and,
- *Collaboration When Working with the Contemporary Family* at the 45th Annual Notre Dame Tax & Estate Planning Institute, held on September 26th in South Bend, IN. This panel discussed issues regarding how various types of professional advisors can collaborate effectively in serving the modern family;

If you would like more information about the publication Tools & Techniques of Estate Planning for Modern Families or any of the topics mentioned above, please contact Kim Kamin at kkamin@greshampartners.com or 312 327 5020.

About Gresham

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