



THE CHICAGO COMMUNITY TRUST
AND AFFILIATES

The Chicago Community Trust Presents....

Advisor Dialogues: Planning in a Low Rate Environment

Exploring planning opportunities to benefit charity, family or both.

Date: Tuesday, June 9, 2020

Time: Noon-1:00 p.m.

To attend, please RSVP to rsvp@cct.org by Monday, June 8.

You are cordially invited to join a webinar with Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, Dick Lang, Partner at McDermott Will & Emery LLP and Don Gottesman, Director of Gift Planning at The Chicago Community Trust. They will discuss ways clients can take advantage of the historically low applicable federal rate used for calculating certain gifts. (For June, that rate is 0.60.)

Kim, Dick and Don will discuss:

- vehicles, such as retained life estate gifts, charitable lead trusts, grantor retained annuity trusts, which are particularly beneficial now;
- assets that are best for funding these vehicles; and
- tips for investing assets for these vehicles

Our discussion will be moderated by Tim Bresnahan, Senior Director of Gift Planning at The Chicago Community Trust.

Please come with your questions as there will be an opportunity to ask them toward the end of the session.

We look forward to seeing you!

MEET OUR CONTENT EXPERTS

Kim Kamin is a Principal at Gresham Partners LLC, an independent multi-family office that currently serves about 100 ultra-high net worth families nationally. At Gresham, Ms. Kamin serves as Chief Wealth Strategist, leading Gresham's development and implementation of estate, wealth transfer, philanthropic, educational and fiduciary planning activities. Previously she was a partner at Schiff Hardin LLP where she practiced in trusts and estates for many years.



Ms. Kamin is an adjunct professor at the Northwestern University Pritzker School of Law, on the Editorial Advisory Board of *Trusts and Estates Magazine*, Vice-President for the Chicago Estate Planning Council, and on advisory boards for multiple local philanthropic organizations. She is a member of The Economic Club of Chicago, and a Regent with the American College of Trust and Estate Counsel. She is a frequent speaker and writer nationally, who co-authored the Leimberg Library book, *Estate Planning for Modern Families*. Ms. Kamin received her B.A. from Stanford University and her J.D. from the University of Chicago Law School.

Dick Lang delivers a wide array of legal services to many of the wealthiest individuals and families in the United States. He concentrates on wealth transfer and income tax planning for venture capital and entrepreneurial clients, as well as counseling for family offices.



Dick has extensive experience fashioning customized trusts and navigating the many issues that arise in "decanting" old, irrevocable trusts into new trusts that better reflect clients' current goals. Additional areas of experience include charitable planning and planning for owners of art. His expertise has placed him on a national short list of practitioners with the experience and judgment suitable for the most demanding private clients. He lectures frequently on a variety of estate planning subjects and was an early contributor to the development of zCalc™, an Excel add-in that delivers sophisticated spreadsheet functions for estate planners. He received his J.D. from John Marshall Law School and his L.L.M. from Boston University School of Law.

Don Gottesman is Director of Gift Planning at The Chicago Community Trust, where he partners with donors and their advisors who would like to support their favorite charities now or in the future. He works with a broad range of assets from cash and marketable securities to closely held C and S Corp stock, IRAs and other types of assets. Gottesman also works with various charitable vehicles such as donor advised funds, wills, trusts, charitable gift annuities and charitable trusts.



He has over 20 years of experience in charitable giving and tax. Gottesman also practiced law for over 10 years in Chicago where he specialized in estate planning and business law. He received his J.D. and L.L.M. in Tax from Chicago-Kent College of Law and his Bachelor of Arts in Humanities from Northwestern University.

Tim Bresnahan is the Senior Director of Gift planning for The Chicago Community Trust. He is responsible for a broad range of matters including charitable contributions, donor advised funds, supporting organizations, agency endowments and other legal, tax and investment aspects of tax-exempt organizations.



Prior to joining the Trust, Bresnahan served as the Associate Director of Philanthropic Advisory Services for Northern Trust. While at Northern Trust, he advised individuals and families on philanthropy and wealth planning. He also managed the Northern Trust Charitable Giving Program. Bresnahan earned a Bachelor of Science degree in Foreign Service from Georgetown University and a J.D. degree from the Chicago-Kent College of Law.