



EVENTS

Playing the Disclaim Game: Accessing Optionality in Planning and Problem-Solving

53rd Annual Heckerling Institute on Estate Planning
Orlando, FL
January 17, 2019



Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, participated on a panel, along with Miriam Wogan Henry, Jones Walker LLP; and Daniel S. Rubin, Moses & Singer LLP, on *Playing the Disclaim Game: Accessing Optionality in Planning and Problem-Solving* at the 53rd Annual Heckerling Institute on Estate Planning, which was held on January 17, 2019, at the Orlando World Center Marriott, in Orlando, FL.

Laws change, life changes; clients are looking for planning that adapts. The panelists covered a variety of case-studies involving tax, charitable and asset protection planning issues to illustrate how disclaimers can attain client goals as circumstances shift.

If you would like additional information, please contact Kim Kamin at kkamin@greshampartners.com, or 312-960-0200.