FOR IMMEDIATE RELEASE

Kim Kamin Presents at Notre Dame 49th Tax and Estate Planning Institute

CHICAGO, IL, July 20, 2023 — As recently announced in their program brochure, Kim Kamin, Gresham's Chief Wealth Strategist, will be presenting at the Notre Dame Tax and Estate Planning Institute in two separate sessions.

Her session on *Charitable Planning Using Non-Charitable Trusts* will share ideas for how estate planning professionals can help clients tap into noncharitable irrevocable trusts for charitable giving. The discussion will include (i) review of the applicable tax deduction rules, (ii) ideas for utilizing existing irrevocable trust assets for desired or obligatory gifts to charity, and (iii) suggestions for provisions to include in new trusts to promote flexibility for future family philanthropy.

She will also present with the *Trusts & Estates Magazine* Advisory Board Panel on *Defining Descendants: Practical and Sometimes Surprising Considerations for Practitioners* that will address who is defined as a "descendant" for inheritance, estate and trust purposes and the issues impacting these definitions including adoption, foster and step-children, assisted reproductive technologies, and posthumous descendants.

Here is a link to register for the Institute: Registration Link

As Chief Wealth Strategist, Ms. Kamin leads Gresham's development and implementation of activities related to wealth transfer planning, fiduciary planning, estate and trust administration, philanthropy, and family engagement and education.

Ms. Kamin is an adjunct professor at the Northwestern University Pritzker School of Law, on faculty for the University of Chicago Booth School of Business Executive Education, on the Editorial Advisory Board of *Trusts and Estates Magazine*, Regent for the American College of Trust and Estate Counsel (ACTEC), Estate Planning and Legal Issues Domain Chair for the UHNW Institute. A frequent speaker and writer nationally, she was co-executive editor and co-author of the Leimberg Library Tools & Techniques book, *Estate Planning for Modern Families*. She received her B.A. from Stanford University and her J.D. from the University of Chicago Law School.

About Gresham

Gresham Partners is an independent investment and wealth management firm that has been serving select families and family offices as a multi-family office and an outsourced chief investment officer since 1997. Gresham is wholly owned by its senior professionals, client fees are its sole source of compensation, it avoids conflicts of interest that affect many other firms and it acts as a fiduciary dedicated to serving its clients' best interests. For more information about Gresham, please go here.

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