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Trust Investing to Satisfy Spending Needs and Protect Capital

South Dakota Trust Association Fall Forum
Sioux Falls, SD
October 16, 2018



Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, presented *Trust Structure for Investing and Fiduciary Considerations in Portfolio Construction*, along with Ted Neild, President and Chief Investment Officer at Gresham Partners, LLC, at the South Dakota Trust Association Fall Forum, which was held on October 16, 2018, at Augustana University, Sioux Falls, SD.

This presentation addressed how prudent trustees should think about trust structure and investing. The presentation examined optimal trust structure for flexibility in distributions and investing and offers a challenge to the conventional approach to asset allocation and manager selection.

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