



EVENTS

Advisor Dialogues: Planning in a Low Rate Environment

Chicago Community Trust (CCT)
Webinar
June 9, 2020



Kim Kamin, Chief Wealth Strategist at Gresham Partners, LLC, was a panelist in “*Advisor Dialogues: Planning in a Low Rate Environment*” at the Chicago Community Trust, which was held on June 9, 2020 via national webinar.

Kim, along with Dick Lang, Partner at McDermott Will & Emery LLP and Don Gottesman, Director of Gift Planning at The Chicago Community Trust took part in a panel moderated by Tim Bresnahan, Senior Director of Gift Planning. They discussed 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 discussed: 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

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