EVENTS | 09.29.2026

Kristin Abati, Renat Lumpau, John Chambers, and Kevin Sarro Present to YPO's Family Office Principals Group

Kristin Abati, Renat Lumpau, John Chambers, and Kevin Sarro presented "Family Office Structuring Under Lender" to the Family Office Principals Group, a peer network within the Young Presidents' Organization (YPO) for principals who lead single- and multi-family offices. The presentation took place on September 24, 2026.

The team walked through the tax and structural considerations behind setting up a family office – including how the Lender Management case shapes "trade or business" treatment, profits interest structuring, and the SEC family office exemption."

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