

Caution Heavy Load: The Surprisingly Weighty Issues Associated with Estate Planning for Carried Interests

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Carried interests are included in real estate, hedge fund, and other private equity investment vehicles. Because of their appreciation potential, carried interests can appear to be attractive assets to use in a variety of estate planning techniques. However, sometimes when junior family members acquire carried interests in deals in which senior family members are invested, there are unintended and punitive gift tax consequences by virtue of a little known provision of the Internal Revenue Code. Learn about the landmines of estate planning with carried interest, and how to avoid them.

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