

Speaking Engagements | December 9, 2021 | 1:00 PM - 4:00 PM ET

# ACG New York Private Equity RoundTable Dinner Series

**The Penn Club**  
**30 West 44th Street New York**  
**New York, NY 10036**

## SPEAKERS

[James D. Rosener](#) | [Morgan Klinzing](#)

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**Thursday, December 9 • 6:00 – 9:00 p.m. ET**

Troutman Pepper is a proud sponsor of the ACG New York Private Equity RoundTable Dinner Series. This RoundTable is a quarterly meeting that hosts speakers to address topics that provide services and information designed to help PE firms operate their business (regulatory, management assessment techniques, sales performance improvement, developing strong investor relationships, fund raising, etc.).

This RoundTable session will discuss the myriad of tax issues that may or will affect Private Equity firms going into 2022 and beyond. The focus will cover not only carried interest, but also offsets, loans to fund individual GP member investments and how they may be taxed in the future (ordinary or capital gains treatment), and overall issues for GPs under the proposed new tax laws. We will also discuss the proposed reform in the context of the value technology can have in understanding future tax impact. Technology now plays a pivotal role in delivering tax efficiencies and savings, whether that be to the bottom line or impact achieved through digital transformation for tax.

These meetings are open only to Private Equity Firms and subject the following criteria: North American funds with Committed Funds in excess of \$100mm. Attendance is limited to one member from the PE firm at the Partner/ MD level who has firm wide responsibilities that may include Business Development but NOT exclusively Business Development Membership is on an annual basis and limited to 30 members.

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