

Policy and Taxation Group's Pat Soldano to Speak on New Family Office 'Mindset' at IVYFON's LA Family Office Forum

The Century City Live and Online Event Features a Deep Dive into Family Office Issues and Trends at This Year's Two-Day Forum, May 8-9

LOS ANGELES, CALIFORNIA, UNITED STATES, May 2, 2024 / EINPresswire.com/ -- The two-day Ivy Family Office Network Forum this year features a deep dive into "[Family Office Trends](#)," with Pat Soldano, Founder and President of the Policy and Taxation Group, as one of its featured speakers.

The IVYFON event, held in Century City from May 8-9, focuses on economics, alternative investment strategies, hard assets, energy transition, the private investment outlook, and Next Generation transitioning.

The online and live forum will be live streamed to some 300-350 people and will be broadcast globally each day.

Soldano will be featured on Day 2 of the event, which includes such other headliners as MK Champion of Avior Institutional, Art Bilger of WorkingNation, Julian Adams of Stand Up To Cancer, Alan Snyder of Shinnecock Partners/aShareX, John Molina of Pacific6, and Jesse Draper of Halogen Ventures.

Policy and Taxation Group (PaTG) is a bipartisan, non-profit Policy and Taxation Group based in Washington, DC. PaTG is the voice of [family offices](#) and successful individuals and is focused exclusively on the tax and economic Issues that impact them.

The IVYFON Family Office 2024 Trends Forum is being held at the offices of Greenberg Glusker



from 8AM – 5PM Eastern Time on both days. Soldano will make her presentation on Day Two of the forum from 2:40PM - 3:05PM EST.

“As many generationally-owned family businesses look to transition to the next generation, the role of the family offices is also transitioning from a strictly investment approach to a more holistic approach,” says Soldano. “There is a need today, and in future, to have more integrated solutions that work throughout the course of a lifetime, and for the next generation,” she says. “I look forward to sharing these trends with the IVYFON audience at this year’s forum.”

Soldano is also President of the bipartisan Family Enterprise USA, which advocates for family businesses.

For more information go to <https://ivyfon.com/may8-9forum/agenda.html>. Registration can be made online via (free) Zoom here - <https://ivyfon.com/may8-9forum/registration.html> .

About Policy and Taxation Group

Policy and Taxation Group (PATG) is the Voice of Family Offices and Successful Individuals in Washington, DC, focused exclusively on the Tax and Economic Issues that impact them. Since 1995, PATG has been the leading advocacy group working to reduce and eliminate estate, gift, and GST taxes while blocking increased income and capital gains taxes, the creation of a wealth tax, and other hostile tax policies that punish hard work and success. PATG is a 501(c)(4) organization comprised of families directly or indirectly impacted by these harmful taxes and regulations. For more information or to support, see www.policyandtaxationgroup.com.

About IVYFON

IVYFON provides a variety of services to the Family Office, Deal Sponsor, Fund Sponsor and Institutional Investor community. As a pioneer in the space, it has convened more than 600 information shares in the community via more than 400 forums and more than 200 dinner parties and assorted luncheons, breakfasts and coffee chats over our history. Ivy Family Office Network (IVYFON) has been the leading peer to peer family office network since the early 2000s. More than 50,000 investors, family offices and asset allocators have attended IVYFON and its events.

Users of its services range from family offices, institutional investors and institutional consultancies to fund and deal sponsors. It provides full cycle concierge service to our presenters and sponsors as many have originated with us as emerging managers or service providers and later participate with us as public companies or family offices themselves.

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