

Anchin to Host Third Annual Financial Services Forum on May 19 in New York City

This event will bring together senior executives, fund managers, and financial services leaders for a morning of innovative dialogue and strategic insight.

NEW YORK, NY, UNITED STATES, May 11, 2026 /EINPresswire.com/ -- [Anchin](#), a New York-based accounting and advisory firm, will host its [Third Annual Financial Services Forum](#) on Tuesday, May 19th at 8:00 a.m. in New York City. Anchin designed the Financial Services Forum as a premier gathering for leaders navigating today's market. Attendees can expect to hear perspectives on fund formation, alternative investments, and tax strategies delivered by accomplished professionals at the forefront of the industry.

This year's program will feature three highly relevant panels addressing today's most pressing industry issues:

Structuring Success: Operational, Legal, and Strategic Approaches to Fund Formation

Moderated by Marina Shah, Partner at Anchin, this all women-led panel will deliver a thoughtful and practical examination of fund formation. Panelists will discuss building credibility and investor confidence, legal considerations, and strategic structuring decisions that support long-term performance and scalable growth.

Beyond Traditional: Key Trends Reshaping the Alternatives Market

Moderated by David Horton, Partner and Assurance Leader of Anchin's Financial Services Group, this session will explore the forces redefining alternative investments. Panelists will examine emerging fund structures, the growing emphasis on investor optionality and liquidity, and the continued rise of SPV and series structures, offering insight into what these shifts mean for managers and investors alike.



Tax Strategy 2026: Planning Opportunities for the Financial Services Industry

The day's final panel, moderated by E. George Teixeira, Partner and Leader of Anchin's Financial Services Group, will provide a timely update on key tax developments. Topics will include recent court cases and their tax planning implications, critical state and local tax updates, and strategies related to withholding tax relief and recovery services.

"Last year's forum exceeded expectations, both in the quality of speakers and the relevance of the topics," said Bill Rapavy of Outpoint Capital Management. "I'm excited to attend again and engage with this year's lineup of speakers and industry leaders."

The Third Annual Financial Services Forum will take place in person in New York City. Advance registration is required. To learn more and reserve your place among industry leaders, visit the link [here](#).

About Anchin:

Anchin is a leading accounting, tax, and advisory firm specializing in the needs of privately held companies, investment funds, and high-net-worth individuals and families. Its highly focused industry specialization helps clients overcome challenges and achieve their financial objectives confidently. Consistently recognized in respected "best of" lists for service, firm management, and employee satisfaction, Anchin prioritizes partner-level engagement and commitment to employee happiness. The full-service firm, with a staff of approximately 600—including more than 70 partners, principals, and managing directors—provides a wide range of assurance, financial reporting, tax, and advisory services. Anchin has offices in New York City, Uniondale, New York, Boca Raton, Florida, and Palm Beach Gardens, Florida, and is a member of BKR International. Recalculate what's possible by visiting us online at www.anchin.com.

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