

sangamonvalley

ESTATE PLANNING COUNCIL

Luncheon Program

Tuesday, May 9th, 2017

Managing Taxable Investments: Techniques for Mitigating Tax Costs in Investments

Presented by:

Ryan McNeill

VP, Managing Regional Director Natixis Global Asset Management

Ryan joined Natixis in 2010. He has a degree in Accounting and Economics from Merrimack College.

About Natixis Global Asset Management:

Natixis Global Asset Management serves thoughtful investment professionals with more insightful ways to understand and manage risk. Through our Durable Portfolio Construction[®] approach, we help them construct more strategic portfolios that seek to produce better outcomes in today's unpredictable markets. We draw from deep investor and industry insights and partner closely with our clients to put objective data behind the discussion. Natixis Global Asset Management is ranked among the world's largest asset management firms.¹ Uniting over 20 specialized investment managers globally (\$877.1 billion AUM²), we bring a diverse range of solutions tailored to meet every strategic challenge. From insight to action, Natixis helps our clients better serve their own with more durable portfolios.

¹ Cerulli Quantitative Update: Global Markets 2016 ranked Natixis Global Asset Management, S.A. as the 16th largest asset manager in the world based on assets under management (\$870.3 billion) as of December 31, 2015.

² Net asset value as of December 31, 2016. Assets under management (AUM) may include assets for which non-regulatory AUM services are provided. Non-regulatory AUM includes assets which do not fall within the SEC's definition of 'regulatory AUM' in Form ADV, Part 1.

Time: 12:00 Noon to 1:30 p.m.

Where: The Sangamo Club - 227 East Adams, Springfield, IL

RSVP on or before Monday, May 8, 2017 to: Erin Tozer: etozer@ucbbank.com or (217) 787-3000

Lunch will be served

Vegetarian or other special dietary requests may be made when you RSVP or by calling The Sangamo Club (544-1793) at least 24 hours in advance of the luncheon.

There is an additional fee of \$15.00 for each guest accompanied by a member.

Payment may be made upon arrival.

•Dues may be paid upon arrival at the luncheon•

PLEASE BE SURE TO RSVP BY THE ABOVE DATE IF YOU PLAN TO ATTEND – WE RELY ON RSVP'S TO DETERMINE SEATING, THE NUMBER OF LUNCH PLATES NEEDED, AND THE NUMBER OF HANDOUTS THE SPEAKER WILL BRING. THANK YOU!