

# CBIT Education Inc.

The Committee consists of National and State Banks, Trust Companies, Private Banking Institutions and Institutional Banks. The members of its executive committee and its officers are selected from representatives of these institutions. Its objectives are (a) to cooperate in assisting in the administration of tax laws; (b) to disseminate among its members information pertaining thereto; and (c) to act as a clearing house for communications to or instructions from Federal and State tax Authorities.

James R Housman, Chairman  
Ariel Assa, Vice-Chairman  
Merileen Letzter, Secretary  
Diego Restrepo, Treasurer

Federal ID # 80-0574679  
Tax Exempt

Website: [www.cbit-usa.org](http://www.cbit-usa.org)

Address all communications to:

Mr. James R Housman  
Peapack-Gladstone Bank  
500 Hills Drive, Suite 300  
Bedminster, NJ 07921  
Tel: (908) 719-3313  
Fax: (908) 375-3841

**34th Annual Spring Tax Day**  
**JP Morgan Chase**  
**Brooklyn Campus Conference Center**  
**4 Chase MetroTech Center,**  
**Brooklyn NY 11245-0001**  
**June 24, 2019**  
**CORPORATE AGENDA**

<u><b>Time</b></u>	<u><b>Topic</b></u>	<u><b>Speakers</b></u>
12:00pm - 12:30pm	<b>Registration + Lunch (<u>to be served starting at 11:45am</u>)</b>	
12:30pm - 1:40pm	<b>BEAT and 163(j): Current Issues</b>	<b>Jeff Hochberg</b> <b>Sullivan &amp; Cromwell</b> <b>Jay Klein</b> <b>PWC</b> <b>Maureen Smith</b> <b>Credit Suisse</b>
1:40pm - 1:50pm	<b>Break</b>	
1:50pm - 2:50pm	<b>OECD / UN developments: digital tax developments and financial transactions guidance</b>	<b>Matthew Frank</b> <b>KPMG</b> <b>Michael Plowgian</b> <b>KPMG</b> <b>Saul Rosen</b> <b>Citibank</b> <b>Ellen Kandel-Burg</b> <b>JPMorgan</b>
2:50pm - 3:00pm	<b>Break</b>	

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## Time

## Topic

## Speakers

3:00pm - 4:00pm

***Recent International Tax  
Developments in TCJA***

***David Rosenbloom  
Caplin & Drysdale  
Clark Armitage  
Caplin & Drysdale  
Vadim Novik  
JPMorgan***

4:00pm - 5:00pm

***State & Local Tax Updates for Financial  
Institutions Including: Wayfair & Tax Nexus,  
State Tax & Your Mobile Workforce, GILTI,  
New Jersey's Tax Changes, NY Tax Update  
& More***

***Ron Rabkin  
Macquarie  
Louis Palladino  
KPMG***

5:00pm - 6:30pm

***Cocktail Reception***