

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.

Adam S Rosenberg, Chairman
James R Housman, Vice-Chairman
Michael Swiader, Secretary
June Goettert, Treasurer

Federal ID # 80-0574679
Tax Exempt

Website: www.cbit-usa.org

Address all communications to:

Adam S Rosenberg
Neuberger Berman Trust Company NA
919 Market Street, Suite 506
Wilmington, DE 19801
Tel: (302) 830-4352
Fax: (646) 885-9438

***43rd Annual Fall Tax Day
Credit Suisse Securities (USA)LLC
1 Madison Avenue
New York, NY 10017***

November 15, 2012

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 8:55	Registration – Sponsors - Coffee	
8:55 – 9:00	Opening Remarks	James R Housman <i>Vice-Chairman, CBIT</i> Henry Lievre <i>Fiduciary Chairman, CBIT</i>
9:00 – 10:15	Estate Planning Update/ What’s New and Current Developments/ “Benefits” after “Retirement”/ Gift-Splitting	Bruce Steiner <i>Kleinberg, Kaplan, Wolff & Cohen, PC</i>
10:15 – 10:30	Morning Break	Sponsor Room
10:30 – 11:10	Why is Everyone Talking About Delaware Trust	Norris P Wright <i>Gordon, Fournaris & Mammarello P.A.</i>
11:10-12:00	“Ring in the New Year with the 3.8% Surtax on Net Investment Income”	Dave Nave <i>Pitcairn Trust Company.</i>

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.

Adam S Rosenberg, Chairman
James R Housman, Vice-Chairman
Michael Swiader, Secretary
June Goettert, Treasurer

Federal ID # 80-0574679
Tax Exempt

Website: www.cbit-usa.org

Address all communications to:

Adam S Rosenberg
Neuberger Berman Trust Company NA
919 Market Street, Suite 506
Wilmington, DE 19801
Tel: (302) 830-4352
Fax: (646) 885-9438

12:00 – 2:00*

Lunch

Luncheon Speaker

*Benjamin Pace
(US Chief Investment Officer/Head
Global Investment Solutions-
Americas) Deutsch Bank*

The John Rozsa Memorial Scholarship Award

Scholarship Recipient

Representing Fordham University

Prof. Allen Shiff

Scholarship Recipient

Representing Pace University

Prof. Walter G. Antognini

2:00 – 3:15

Back to the Future?

*A Look at Federal Estate and
Fiduciary Taxes in 2013*

*Michael F Macero
KPMG LLP*

3:15 – 3:30

Afternoon Break

Sponsor Room

3:30 – 5:00

Special Asset Reporting Issues

*Daniel Waltman
Kelly Totin
Laurie Adatepe
PricewaterhouseCoopers*

5:00 – 7:00

Cocktail Reception

¹CLE Credits are not anticipated for this course

****Joint Session for Corporate & Fiduciary; after the Lunch Break,
please return to your respective agendas.***