

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.

John Gallagher, Chairman
Andrew Barkin, Vice-Chairman
June Goettert, Secretary
Ariel Assa, Treasurer

Federal ID # 80-0574679
Tax Exempt
Website: www.cbit-usa.org

Address all communications to:
Mr. John J. Gallagher
Unicredit Bank AG, N.Y Branch
150 East 42nd Street
New York, NY 10017
Tel: (212) 672-5448
Fax: (212) 672-5532

***45th Annual Fall Tax Day
Credit Suisse Securities (USA) LLC
1 Madison Avenue (23rd Street & Madison Ave.)
New York, NY
November 20, 2014***

FIDUCIARY AGENDA

<i><u>Time</u></i>	<i><u>Topic</u></i>	<i><u>Speakers</u></i>
8:00 – 8:45	<i>Registration – Sponsors – Coffee</i>	<i>James R Housman Chairman, CBIT Andrew Barkin Vice Chairman, CBIT J Scott Crafton Fiduciary Chairman, CBIT Henry Lievre Master of Ceremonies</i>
8:45 – 10:15	<i>IRS Update – Priorities, Challenges and Best Practices (Joint Session with Corporate)</i>	<i>Beth Tucker PWC Donald Roman PWC Dominick Dell'Imperio PWC</i>
10:15 – 10:30	<i>By Laws Vote</i>	<i>James R Housman CBIT Chairman</i>
10:30 – 10:45	<i>Morning Break</i>	
10:45 – 12:00	<i>Cost Basis Reporting</i>	<i>Stevie Conlon Wolters Kluwer</i>

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12:00 – 2:00*

***Lunch**
Luncheon Speaker
***Does the Federal Reserve Really Know
What It's Doing?"***

Steve Forbes

***The John Rozsa Memorial Scholarship
Award*** *Prof. John J Gallagher*

2:00 – 3:15

*Changes to New York's Estate Tax and
Fiduciary Income Tax Laws*

Blanche Lark Christerson
Deutsche Bank

3:15– 3:00

Afternoon Break

3:30 – 5:00

Unbundling of Fiduciary Fees
Are you Ready?
A Panel Discussion

Henry Lievre
Moderator

Lawrence F McGuire
PWC

Carrie Sechel
Deloitte

Chris Gillam
KPMG

Ken Novak
EY

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5:00 – 7:00

Cocktail Reception