

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 J Gallagher, Chairman
James R Housman, 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, NY Branch
150 East 42nd Street
New York, NY 10017
Tel: (212) 672-5448
Fax: (212) 672-5532

***30th Annual Spring Tax Day
Credit Suisse Securities (USA) LLC
1 Madison Avenue (23rd Street & Madison Ave.)
New York, NY 10017
May 20th, 2015***

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
10:00 – 10:55 AM	Registration	
10:55 – 11:00 AM	Welcome & Opening Remarks	James R Housman, Chairman, CBIT John Gallagher, Chairman, CBIT Education
11:00 – 12:30 PM	FATCA 2015 – Practical Implementation Issues (Joint Session)	Maureen Smith, Credit Suisse - Moderator Jonathan Jackel, Burt, Staples & Maner
12:30 – 1:30 PM	Lunch & Annual Spring Meeting	
1:30 – 2:30 PM	U.S. Taxation of Foreign Trusts with U.S. Beneficiaries – What a Trustee Should Know	Dawn Angermaier, Deloitte
2:30 – 3:30 PM	Income Tax Issues When a Trust Owns a Partnership Interest	Dave Nave, Pitcairn Trust Company
3:30 – 3:45 PM	Break	
3:45 – 5:00 PM	Asset Preservation for Seniors and their Families	Anthony Enea, Enea, Scanlan & Sirignano

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5:00 – 6:30 PM

Cocktail Reception

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