

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
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Tax Exempt

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33rd Annual Spring Tax Day
JP Morgan Chase
270 Park Ave New York, NY
April 23th, 2018
CORPORATE AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
12:00pm - 12:20pm	Registration	
12:20pm - 12:55pm	Lunch/Annual Meeting Mark Taccetta Chairman, CBIT	James R. Housman Chairman, CBIT Education
1:00pm - 2:05pm	Selected Tax Reform Topics: 163(j), 864(c)(8) and 1446(f)	Robert Cassanos Fried, Frank, Harris, Shriver & Jacobson Philip Wagman Clifford Chance Jonathan Silver Jefferies
2:05pm - 2:15pm	Break	
2:15pm - 3:20pm	US State and Local Tax Issues for Financial Institutions Resulting from Federal Tax Reform	Michelle Zahler E&Y Walt Bieganski E&Y Ron Rabkin Macquarie
3:30pm - 5pm	Brave New World of International Taxation: GILTI, BEAT, and Section 965	Philip Fried PWC David Rosenbloom Caplin & Drysdale Clark Armitage Caplin & Drysdale Ariel Assa JPMorgan
5:00pm - 6:00pm	Cocktail Reception	