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*48th Annual Fall Tax Day
Credit Suisse Securities (USA) LLC
11 Madison Avenue • New York, NY
November 30, 2017*

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 9:00	Registration – Sponsors – Coffee	
9:00 – 9:55	<i>U.S. Estate and Gift Taxation of Nonresident Aliens</i>	Kevin Matz, Partner Stroock & Stroock & Lavan LLP
9:55 – 10:50	<i>State Taxation update – Kaestner Appeal and other States' Challenges</i>	<i>Carl King, Partner Culp Elliott & Carpenter, P.L.L.C. North Carolina</i>
10:50 – 11:05	Morning Break	
11:05 – 12:00	<i>Final and Administration Expense Deduction –Form 706, 1040, and 1041</i>	Albert Vernacchio PwC, Managing Director
12:00 – 2:00	Lunch "Tax Reform: Tax Policy Outlook <i>The John Rozsa Memorial Scholarship Award</i>	Larry Seyfried American Bankers Association Congressional Relations & Political Affairs <i>Prof. John J. Gallagher</i>
2:00 – 3:30	<i>Fiduciary Litigation Potholes</i>	<i>Laura Lattman, Partner Litigation, Trusts and Estates Mclaughlin & Stern, LLP</i>
3:30– 3:45	Afternoon Break	
3:45 – 5:00	<i>Trust holding Foreign Assets Revisited – Reporting Complexities</i>	Benjamin Wright Senior Manager EY, Private Client Services
5:15 – 6:15	Cocktail Reception	