

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
Diego Restrepo, Treasurer

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

Address all communications to:
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***49th Annual Fall Tax Day
New York University School of Law
Vanderbilt Hall
40 Washington Square South
New York, NY 10012***

CORPORATE AGENDA October 25, 2018

| <u>Time</u> | <u>Topic</u> | <u>Speakers</u> |
|--------------------|--|---|
| 8:00 – 9:00 | <i>Registration – Sponsors – Coffee</i> | |
| 9:00 – 10:55 | <i>Recent International Tax Developments Under TCJA – Section 965, GILTI and BEAT</i> | David Rosenbloom <i>Caplin & Drysdale</i> Kirsten Burmester <i>Caplin & Drysdale</i> Elizabeth Stevens <i>Caplin & Drysdale</i> Marjorie Rollinson <i>Associate Chief Counsel (International), IRS</i> Jonathan Silver <i>Jefferies Group</i> |
| 10:55 – 11:15 | <i>Morning Break</i> | |
| 11:15 – 12:10 | <i>Joint Session – Tax Reform Review (Income Tax Provisions)</i> | Greg Rosica <i>Partner, Ernst & Young LLP</i> |
| 12:10 – 1:45 | <i>Lunch</i> <i>Washington Tax Update</i> | Mark Prater <i>PwC, former Chief Tax Counsel for Senate Finance</i> |
| | <i>The John Rozsa Memorial Scholarship Award</i> | <i>Prof. John J. Gallagher</i> |

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1:45 – 2:40

*Joint Session – The New World of
Responsible Officer Certifications*

Tara Ferris
Ernst & Young, LLP
Jonathan Sambur
Mayer Brown
Adam Ludman
JP Morgan Chase & Co.

2:40– 3:00

Afternoon Break

3:00 – 5:00

*Joint Session - Ethics – EAs, CPAs &
Attorneys*

Megan L. Brackney
Kostelanetz & Fink, LLP

5:00 – 7:00

Cocktail Reception