

# CBIT Education Inc.

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Tax Exempt

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***34th Annual Spring Tax Day  
PricewaterhouseCoopers - PWC  
300 Madison Ave New York, NY  
July 17<sup>th</sup>, 2019***

## ***FIDUCIARY AGENDA***

<b><u>Time</u></b>	<b><u>Topic</u></b>	<b><u>Speakers</u></b>
12:00 - 12:45pm	<b><i>Registration / Lunch</i></b>	
12:45 - 2:00pm	<b><i>Dissecting the Partnership K-1: A Trustee's Identification and Accounting of K-1 Items</i></b>	<b>Michael F. Macero</b> <i>Director - Tax, PwC</i>
2:00 - 2:55pm	<b><i>Generation-Skipping Transfer Tax Exemption Allocation: Often Automatic, But Rarely Straightforward</i></b>	<b>Michael S. Schwartz</b> <i>Partner, Curtis, Mallet-Prevost, Colt &amp; Mosle, LLP</i>
2:55 - 3:10pm	<b><i>Break</i></b>	
3:10 - 4:05pm	<b><i>Developments in State Taxation of Trusts</i></b>	<b>Michael S. Canfield</b> <i>Senior Manager - Deloitte Tax LLP</i> <b>Sara Clear</b> <i>Washington National Tax-Multistate - Deloitte Tax LLP</i>
4:05 - 5:00pm	<b><i>Regulatory and Legislative Update: ABA Overview and Washington's Outlook on Banking</i></b>	<b>Phoebe A. Papageorgiou</b> <i>Vice President, American Bankers Association</i>
5:00 - 6:00pm	<b><i>Cocktail Reception</i></b>	