

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:

Mr. James R Housman
Peapack-Gladstone Bank
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50th Annual Fall Tax Day
PricewaterhouseCoopers LLP
300 Madison Avenue (42nd Street & Madison Ave.)
New York, NY
Thursday, November 21, 2019

<u><i>Time</i></u>	<u><i>Topic</i></u>	<u><i>Speakers</i></u>
8:20 – 9:00	Registration + Breakfast	
9:00 – 10:30	IRS latest Developments and Tax Technology Trends, Transformation and Updates in the Banking Industry	<i>Paul DeNard</i> <i>Erena Antonakis Borriello</i> <i>Stephen Beckwith</i> PWC <i>Betty Du</i> Unicredit
10:30 – 10:45	Break	
10:45 – 12:00	Recent Tax Developments in Financial Products including Libor Transition	<i>Mike Shulman</i> Shearman & Sterling <i>Lucy Farr</i> Davis Polk <i>Maureen Smith</i> Credit Suisse
12:00 – 12:30	Lunch + John Rosa Scholarship	
12:30 – 1:30	A View from Washington	<i>Todd Metcalf</i> PWC
1:30 – 1:45	Break	

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1:45 – 3:15

Recent International Tax
Developments

Chris Housman
David Lasker
E&Y
Vadim Novik
JPMorgan

3:15 – 3:30

Break

3:30 – 5:00

US State and Local Tax Issues and
Developments Impacting Financial
Institutions

Gabriella Ianoale
Matthew Musano
E&Y
Ron Rankin
Macquarie

5:00 – 6:30

Cocktails and Networking Reception