

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.

Mark Taccetta, Chairman
Shawn Hanlon, Vice-Chairman/Secretary
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35th Annual Spring Tax Day- "Virtual" *Thursday, June 24, 2021*

FIDUCIARY AGENDA

<u><i>Thursday, June 24, 2021</i></u>	<u><i>Topic</i></u>	<u><i>Speakers</i></u>
<u><i>8:45-8:50</i></u>	<i>Log In to Webinar/Zoom</i>	
<i>8:50-8:55</i>	<i>Introduction of Speakers</i>	<i>Mark Taccetta, CBIT Education Chair</i> <i>Shawn Hanlon, CBIT Vice-Chair</i>
<i>9:00 – 10:15</i>	<i>NRAs Pay Estate Taxes Too!</i>	<i>Michael F. Macero, Director, Washington</i> <i>National Tax</i> <i>KPMG LLP</i>
<i>10:15 – 10:30</i>	<i>Break</i>	
<i>10:30-11:45</i>	<i>Mid-Year Tax Legislation Update</i>	<i>Mary LaSota, Senior Manager, Wealth</i> <i>Management Tax</i> <i>Sara Peffer, Director, Wealth Management Tax</i> <i>PricewaterhouseCoopers LLC</i>