

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.

Michael Macero, Chairperson
John Lebron, Vice-Chairperson/Secretary
Alan Gabel, Treasurer

Website: www.cbit-usa.org

Address all communications to:
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***CBIT 55th Annual Spring Tax Day
May 15th, 2024
Arno Ristorante
141 W. 38th Street
New York, NY 10018***

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 8:45	Registration – Sponsors – Coffee	
8:45 – 9:00	Opening Remarks/ Sponsors	CBIT Education Chairperson
9:00 – 9:55	What to Do When a Beneficiary Dies	Laura Hinson Tax Managing Director, WNT Deloitte Tax LLP
10:00 – 11:10	Examining the Charitable Deduction Under Section 642(c) and 4947(a)(1)	Deanna Meehan Director, RFO Fidelity Personal Trust, FSB
11:10 – 11:25	Break	
11:25 – 12:20	“Place Your Bets”; Will TCJA Remain Or Sunset?	Henry Lievre President Independent Wealth Advisory
12:20 – 1:45	Lunch	
1:45 – 2:40	ESBT Return Challenges & Best Practices	Joe Hull & John Mitchell Ernst & Young LLP
2:40 – 3:00	Break	
3:00 – 3:55	SECURE 2.0	Mike Macero Director, WNT KPMG LLP

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4:00 – 4:55	Tax Topic Discussion	Attendees
5:00 – 6:30	Cocktail Reception	