

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.

Shawn Hanlon, Chairperson
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***CBIT Annual Fall Tax Day
November 21st, 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	Ethics in Tax: Standards for Tax Advice	Megan L. Brackney Kostelanetz LLP
10:10 – 11:05	The Final Digital Asset Broker Tax Reporting Regulations	Stevie Conlon Wolters Kluwer
11:05 – 11:25	Break	
11:25 – 12:20	Estate and Business Planning for Artists And Collectors	Karin McNair Neuberger Berman
12:30 – 2:30	Lunch	
2:30 – 3:25	World of gains: capital, ordinary and other complex tax reporting items	Joe Hull Chelsey Heintzelman Jessica Schonberger EY
3:35 – 4:30	Passport to Foreign Trusts	Mike Macero KPMG
4:30 – 6:30	Cocktail Reception	