

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.

Adam S. Rosenberg, Chairman
James R. Housman, Vice-Chairman
Michael Swiader, Secretary
June Goettert, Treasurer

Federal ID # 80-0574679
Tax Exempt

Website: www.cbit-usa.org

Address all communications to:

Mr. John J. Gallagher
Unicredit Bank AG, N.Y. Branch
150 East 42nd Street
New York, NY 10017
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***27th Annual Spring Tax Day
Credit Suisse Securities (USA) LLC
11 Madison Avenue, Level 2B
New York, NY 10010***

June 14, 2012

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
<i>12:30 – 1:00</i>	<i>Registration</i>	
<i>1:00 – 1:05</i>	<i>Opening Remarks</i>	<i>James R Housman Vice-Chairman, CBIT Henry Lievre Fiduciary Chairman, CBIT</i>
<i>1:05 – 2:00</i>	<i>Taxmageddon – What may the Future hold?</i>	<i>Blanche Lark Christerson Deutsche Bank Private Wealth Management</i>
<i>2:00 – 3:00</i>	<i>Foreign Trust Investments in PFICS and CFCs</i>	<i>Michael Spielman Pricewaterhouse Coopers, LLP</i>
<i>3:00 – 3:15</i>	<i>Coffee Break</i>	
<i>3:15 - 4:10</i>	<i>Proceed with Caution: The Recognition and Taxation of Nonexempt Charitable Trusts</i>	<i>Michael Macero & Tracy Stone KPMG, LLP</i>

RESTRICTED

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4:10 – 5:00

New York State Legislative Update

Bill Bosies

*New York State Bankers
Association*

5:00 – 7:00

Cocktail Reception