

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. Adam S Rosenberg
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*28th Annual Spring Tax Day
Credit Suisse
11 Madison Avenue
New York, NY 10017
June 25th, 2013*

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
12:30 – 1:00 PM	Registration	
1:00 – 1:05 PM	Welcome & Opening Remarks	James R Housman Chairman, CBIT Henry Lievre Fiduciary Chairman, CBIT
1:05 – 2:05 PM	3.8% Surtax Panel	Donald J Roman PricewaterhouseCoopers David Nave Pitcairn Trust Company
2:05 – 3:05 PM	State Tax Nexus Issues	Larry McGuire PricewaterhouseCoopers Damon Rose PricewaterhouseCoopers
3:05 – 3:15 PM	Afternoon Break	
3:15 – 4:00 PM	FATCA Compliance for Fiduciaries	Alan I Appel, Senior Tax Partner Bryan Cave LLP Phillip B Wright, Senior Tax Partner Bryan Cave LLP
4:00 – 5:00 PM	Estate Planning Since the 2012 Act	Blanche Christerson, Managing Director Deutsche Bank Trust Company, NA

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5:00 – 7:00 PM Cocktail Reception