

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.

John J. Gallagher, Chairman
Andrew Barkin, Vice-Chairman
June Goettert, Secretary
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***29th Annual Spring Tax Day
Credit Suisse
11 Madison Avenue
New York, NY 10017
June 24th, 2014***

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
12:15 – 12:55 PM	Registration	
12:55 – 1:00 PM	Welcome & Opening Remarks	James R Housman Chairman, CBIT Henry Lievre Fiduciary Chairman, CBIT
1:00 – 2:55 PM	IRS Ethics	Karen Hawkins Director of Practice IRS
2:55 – 3:10 PM	Afternoon Break	
3:10 – 4:05 PM	Planning and Pitfalls of Selling a Business in Estates and Trust	Bruce Steiner Kleinberg, Kaplan, Wolff & Cohen, PC
4:05 – 5:00 PM	Trust Accounting Income	Henry T Lievre Independent Wealth Advisory Group Inc. Dawn Angermaier Deloitte John S. Reale Wilkie & Wilkie
5:00 – 7:00 PM	Cocktail Reception	