

# 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.

James R Housman, Chairman  
Ariel Assa, Vice-Chairman  
Merileen Letzter, Secretary  
Diego Restrepo, Treasurer

Federal ID # 80-0574679  
Tax Exempt

Website: [www.cbit-usa.org](http://www.cbit-usa.org)

*49<sup>th</sup> Annual Fall Tax Day*  
*New York University, School of Law*  
*Vanderbilt Hall*  
*40 Washington Square South*  
*New York, NY 10012*

Address all communications to:

Mr. James R Housman  
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## ***FIDUCIARY AGENDA*** ***October 25, 2018***

<b><u>Time</u></b>	<b><u>Topic</u></b>	<b><u>Speakers</u></b>
8:00 – 9:00	<b><i>Registration – Sponsors – Coffee</i></b>	
9:00 – 9:55	<b><i>Trust and Estate Settlement Issues</i></b>	<b>Brooke Pollak</b> <i>VP, Bessemer Trust</i> <b>James Housman</b> , <i>Moderator</i> <i>Managing Director, PGBank</i> <b>Angelo Grasso</b> <i>Greenfield Stein &amp; Senior LLP</i> <b>Theresa McGinley, MD</b> <i>Fiduciary Trust Internatiinal</i>
10:00 – 10:55	<b><i>Estate Planning for Digital Assets</i></b>	<b>Brian K. Janowsky</b> <i>Counsel, Schiff Harden LLP</i>
10:55 – 11:15	<b><i>Morning Break</i></b>	
11:15 – 12:10	<b><i>Joint Session – Tax Reform Review (Income Tax Provisions)</i></b>	<b>Greg Rosica</b> <i>Partner, Ernst &amp; Young LLP</i>
12:10 – 1:45	<b><i>Lunch</i></b> <b><i>Washington Update</i></b>	<b>Mark Prater</b> <i>PwC, former Chief Tax</i> <i>Counsel for Senate Finance</i>
	<b><i>The John Rozsa Memorial Scholarship Award</i></b>	<b>Prof. John J. Gallagher</b>

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1:45 – 2:40

*Joint Session – The New World of  
Responsible Officer Certifications*

**Tara Ferris**  
*Ernst & Young LLP*  
**Jonathan Sambur**  
*Mayer Brown LLP*  
**Adam Ludman**  
*JPMorgan*

2:40– 3:00

*Afternoon Break*

3:00 – 5:00

*Joint Session - Ethics – EAs, CPAs &  
Attorneys*

**Megan L. Brackney**  
*Kostelanetz & Fink, LLP*

5:00 – 7:00

*Cocktail Reception*