

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 Gallagher, Chairman
June Goettert, Vice-Chairman
Ariel Assa, Secretary
Mark Taccetta, Treasurer

Federal ID # 80-0574679
Tax Exempt
Website: www.cbit-usa.org

Address all communications to:
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***46th Annual Fall Tax Day
Credit Suisse Securities (USA) LLC
1 Madison Avenue (23rd Street & Madison Ave.)
New York, NY
November 19, 2015***

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 8:45	<i>Registration – Sponsors – Coffee</i>	
8:45 – 9:40	<i>Deduct or Capitalize? That is the Question: A look at the final Repair Regulations; including when a Form 3115 would be needed</i>	<i>Michael F. Macero KPMG</i>
9:40 – 10:30	<i>Documentation for NRA and FATCA withholding</i>	<i>Jonathan Jackel EY</i>
10:30 – 10:45	<i>Morning Break</i>	
10:45 – 12:00	<i>Washington Update</i>	<i>Phoebe Papageorgiou, America Bankers Association</i>
12:00 – 2:00	<i>Lunch Luncheon Speaker "Prospects for Tax Reform."</i>	<i>David Camp PwC</i>
	<i>The John Rozsa Memorial Scholarship Award</i>	<i>Prof. John J. Gallagher</i>
2:15 – 3:15	<i>Strategies for Leveling the Basis Playing Field in Non-Community Property States</i>	<i>Brad Dillon Brown Brothers Harriman Trust Company</i>
3:15– 3:00	<i>Afternoon Break</i>	

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3:30 – 5:00

*The Tax Planning Objectives of Trusts
We See Everyday*

*Al Vernacchio
PwC*

5:00 – 7:00

Cocktail Reception