

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

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47th Annual Fall Tax Day
Credit Suisse Securities (USA) LLC
1 Madison Avenue (23rd Street & Madison Ave.)
New York, NY
December 8, 2016

CORPORATE AGENDA

<u><i>Time</i></u>	<u><i>Topic</i></u>	<u><i>Speakers</i></u>
<i>8:00 – 9:00</i>	<i>Registration – Sponsors – Coffee</i>	
<i>9:00 – 10:00</i>	Possibilities for International Tax Reform in the United States and Elsewhere.	<i>David Merrick</i> <i>Andrew Prior</i> <i>Phillip Fried</i> PWC <i>Jonathan Silver</i> Jefferies
<i>10:00 – 11:00</i>	Tectonic Shifts in International Taxation	<i>David Rosenbloom</i> <i>Peter Barnes</i> Caplin & Drysdale <i>John Gallagher</i> UniCredit
<i>11:00 – 11:10</i>	<i>Morning Break</i>	
<i>11:10 – 12:10</i>	Have you filed your 2015 New York State and City corporate tax returns? (Opportunities and pitfalls in the new law you should know about).	<i>Jeff Serether</i> <i>Gabby Ianoale</i> EY <i>Ron Rabkin</i> Macquarie
<i>12:10 – 2:00</i>	Lunch "Brave New World: Tax Policy Outlook for 2017 under President Trump and a Republican Congress"	<i>Larry Campbell</i> PWC

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	<i>The John Rozsa Memorial Scholarship Award</i>	<i>Prof. John J. Gallagher</i>
2:00 – 3:30	871(m) regulations and QDD implementation – 24 days to go	<i>Mike Shulman</i> Sherman & Sterling <i>Tara Ferris</i> EY <i>Karl Walli</i> U.S. Treasury (via telepresence) <i>Maureen Smith</i> Credit Suisse
3:30– 3:45	<i>Afternoon Break</i>	
3:45 – 5:00	Update on QI Agreements and FATCA	<i>Tom Prevost</i> Credit Suisse <i>Tara Ferris</i> EY Elena Virgadamo U.S. Treasury (via telepresence)
5:00 – 7:00 PM	Cocktail Reception	