

# CBIT Education Inc.

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James R Housman, Chairman  
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Tax Exempt

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**33rd Annual Spring Tax Day**  
**JP Morgan Chase**  
**270 Park Ave New York, NY**  
**April 23rd, 2018**

## **FIDUCIARY AGENDA**

<b><u>Time</u></b>	<b><u>Topic</u></b>	<b><u>Speakers</u></b>
12:00pm - 12:20pm	<b>Registration</b>	
12:20pm - 12:55pm	<b>Lunch/Annual Meeting</b> Mark Taccetta <b>Chairman, CBIT</b>	<b>James R. Housman</b> <b>Chairman, CBIT Education</b>
1:00pm - 2:00pm	<b>Pitfalls and Nuances for Form 990 and 990-PF Filers</b>	<b>Jacob Zehnder</b> <b>EY</b> <b>Deanna Jackson</b> <b>EY</b>
2:00pm - 2:55pm	<b>Through the Years: Tax Updates for 2018-2025</b>	<b>Michael F. Macero</b> <b>PwC</b>
2:55pm – 3:10pm	<b>Break</b>	
3:10pm – 4:05pm	<b>The Tax Cuts and Jobs Act: four months in</b>	<b>Blanche Lark Christerson</b> <b>Deutsche Bank Trust Company, N.A.</b>
4:05pm – 5:00pm	<b>The Trump Effect: Practical Estate Planning in Uncertain Times</b>	<b>Michael S. Schwartz</b> <b>Curtis, Mallet-Prevost, Colt &amp; Mosle, LLP</b>
5:00pm – 6:00pm	<b>Cocktail Reception</b>	