

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

Address all communications to:

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CBIT 50th Annual Fall Tax Day
October 22, 2019
PricewaterhouseCoopers (PwC)
300 Madison Avenue, New York, NY 10017

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 8:55	Registration – Sponsors – Coffee	
8:55 – 9:00	Opening Remarks	Mark Taccetta Chairman, CBIT
9:00 – 9:55	Think Before You Leap US Tax Planning for Individuals Arriving/Leaving The US	Andrew Auchincloss, Partner Schlesinger, Lazetera & Auchincloss, LLP
9:55 – 10:50	Use of 501(c)(4) Organizations in Estate Planning	Jillian E. Merns, Associate Private Clients Group Willkie, Farr & Gallagher, LLP
10:50 – 11:05	Morning Break	
11:05 – 12:00	199A Impact on 2018 Returns and Planning for 2019	Robert S. Keller Tax Managing Director KPMG, Washington National Tax Group
12:00 – 2:00	Lunch Luncheon Speaker	Todd Metcalf PwC, former Chief Tax Counsel for Senate Finance

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2:00 – 3:30	<i>Foreign Trusts</i>	<i>Marianne R Kayan</i> <i>Deanna L. Jackson</i> <i>Ernst & Young, LLP</i>
3:30– 3:45	<i>Afternoon Break</i>	
3:45 – 5:00	<i>S Corps in Trusts and The Impact of the TCJA</i>	<i>Michael F Macero, Director</i> <i>Albert J Vernacchio, Managing Director</i> <i>PwC</i>
5:00 – 7:00	<i>Cocktail Reception</i>	