

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.

Mark Taccetta, Chairman
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***52nd Annual Fall Tax Days- "Virtual"
Tuesday, November 9, 2021 and
Wednesday, November 10, 2021
Hosted by Ernst and Young, LLP***

FIDUCIARY AGENDA

Day 1, Tuesday, Nov 9, 2021

Topic

Speakers

8:30 - 8:50

8:50- 8:55

Log In to Webinar/Zoom

*Opening Remarks and
Introduction of Speakers*

*Mark Taccetta, CBIT Education Chair
& Merileen Letzter, CBIT, Chair*

9:00 – 10:50

Foreign Filings

*Rosy Lor, Senior Manager
Andrea Cruz, Manager
Ernst & Young, LLP*

11:00 – 12:00

Update on PTE by States

*Dale Kim, Partner
Jordan Weintraub, Partner
Ernst & Young, LLP*

Day 2, Wednesday, Nov 10, 2021

Topic

Speakers

8:30-8:50

8:50-8:55

Log In to Webinar/Zoom

*Opening Remarks and
Introduction of Speakers*

*Mark Taccetta, CBIT Education Chair
& Merileen Letzter, CBIT, Chair*

9:00 – 10:00

*Estate Planning and Gift Tax
Updates and Future Landscape*

*Todd Angkatavanich, Principal
Ernst & Young, LLP*

10:15-11:15

Updates on Washington

*Jessica Cameron, Senior National Tax
Ernst & Young, LLP*

A big Thank You to Ernst & Young and its speakers and thank you to all participants! Stay safe!