

# CBIT Education Inc.

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## *36th Annual Spring Tax Day- "Virtual"* *Thursday, June 16, 2022*

### *FIDUCIARY AGENDA*

<u><i>Thursday, June 16, 2022</i></u>	<u><i>Topic</i></u>	<u><i>Speakers</i></u>
<i>8:45-8:50</i>	<i>Log In to Webinar/Zoom</i>	
<i>8:50-8:55</i>	<i>Introduction of Speakers</i>	<i>Merileen Letzter, CBIT Education Chair</i> <i>Shawn Hanlon CBIT Chair</i> <i>(Incoming Chairs)</i>
<i>9:00 – 10:15</i>	<i>GST Update and Refresher!</i>	<i>Michael F. Macero, Director, Washington</i> <i>National Tax</i> <b><i>KPMG LLP</i></b>
<i>10:15 – 10:30</i>	<i>Break</i>	
<i>10:30-11:45</i>	<i>Delaware Directed Trust vs</i> <i>Excluded Trust</i>	<i>Mark Doyle, Principal, Fiduciary Counsel</i> <i>George Kern, Managing Director, Regional Dir</i> <b><i>Bessemer Trust Company of</i></b> <b><i>Delaware NA</i></b>