

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

Address all communications to:
Mr. John J. Gallagher
Unicredit Bank AG, N.Y Branch
150 East 42nd Street
New York, NY 10017
Tel: (212) 672-5448
Fax: (212) 672-5532

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

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 9:00	<i>Registration – Sponsors – Coffee</i>	
9:00 – 9:55	<i>1291 De Coded: Income Tax Reporting Associated with a PFIC Holding</i>	<i>Michael F. Macero KPMG Scott Crafton U.S. Trust</i>
9:55 – 10:50	<i>Proposed 2704 Regs.: Goodnight, Sweet Discounts</i>	<i>Phylip Devine PNC</i>
10:50 – 11:05	<i>Morning Break</i>	
11:05 – 12:00	<i>Planning Options for the Transfer of a Primary Residence</i>	<i>Anthony Enea Enea, Scanlan & Sirignano, LLP</i>
12:00 – 2:00	<i>Lunch</i> "Brave New World: Tax Policy Outlook for 2017 under President Trump and a Republican Congress"	<i>Larry Campbell</i> PwC, Washington National Tax Services
	<i>The John Rozsa Memorial Scholarship Award</i>	<i>Prof. John J. Gallagher</i>
2:00 – 3:30	<i>The Fiduciary's Guide to Navigating the GST Tax Minefield</i>	<i>Rebecca Solomon EY</i>
3:30 – 3:45	<i>Afternoon Break</i>	

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

Address all communications to:
Mr. John J. Gallagher
Unicredit Bank AG, N.Y Branch
150 East 42nd Street
New York, NY 10017
Tel: (212) 672-5448
Fax: (212) 672-5532

3:45 – 5:00

Post-Election Possibilities: the Dust Settles...and thoughts on the 2704 and basis reporting regs

Blanche Lark Christerson
Deutsche Bank Wealth Management

5:15 – 6:15

Cocktail Reception