

Committee of Banking Institutions on Taxation

ESTABLISHED 1918

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.

Adam S. Rosenberg, Chairman
John J. Gallagher, Vice-Chairman
James R. Housman, Secretary
Michael Swiader, Treasurer

Federal ID # 13-6162067
Tax Exempt

Website: www.cbit-usa.org

Address all communications to:

Mr. Adam S. Rosenberg
Lehman Brothers Trust Company, NA
919 Market Street, Suite 506
Wilmington, DE 19801
Tel: (302) 830-4352
Fax: (646) 885-9438

***40th Annual Fall Tax Day
Credit Suisse Securities (USA) LLC
1 Madison Avenue
New York, NY 10010***

November 5, 2009

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 8:55	<i>Registration – Sponsors - Coffee</i>	
8:55 – 9:00	<i>Opening Remarks</i>	<i>Adam S. Rosenberg Chairman, CBIT Henry Lievre Fiduciary Chairman, CBIT</i>
9:00 – 10:15	<i>Roth IRA Conversions: Everything you need to know so your clients will be ready when Roth conversions become available to all in 2010</i>	<i>Bruce Steiner Kleinberg, Kaplan, Wolff & Cohen, P.C.</i>
10:15 – 10:30	<i>Morning Break</i>	<i>Sponsor Room</i>
10:30 – 11:15	<i>GPS Navigation- S Corps in Trusts ¹</i>	<i>David Nave Pitcarin Trust Company</i>
11:15-12:00	<i>Practical issues in the taxation of trusts - How to handle personal residences in trusts, handling withdrawal rights, NOLs and other advanced issues in trust tax compliance ¹</i>	<i>Shawn Hanlon PricewaterhouseCoopers</i>

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12:00 – 2:00*

Lunch

Keynote Speaker
“Outlook for Federal Tax and Budget
Policy-Frightening Waters Ahead”

Kenneth J. Kies
Managing Director - Federal Policy
Group

The John Rozsa Memorial Scholarship Award

Scholarship Recipient
Representing Fordham University

Prof. Allen Shiff

Scholarship Recipient
Representing Pace University

Prof. Walter G. Antognini

2:00 – 3:15

Update on GRATs, Intentionally
Defective Trusts and other Strategic
Planning ideas

Joseph M. Sedlack
Reed Smith

3:15 – 3:30

Afternoon Break

Sponsor Room

3:30 - 4:20

Gearing up for the New Basis
Reporting Rules

Deanna Flores
Laurie Hatten Boyd
KPMG LLP

4:20 – 5:00

Information Reporting with respect
to Widely Held Fixed Income
Investment Trusts (WHFIT) and
other securities requiring
specialized processing¹

William E. Scott
Wall Street Concepts

5:00 – 7:00

Cocktail Reception

¹CLE Credits are not anticipated for this course

****Joint Session for Corporate & Fiduciary; after the Lunch Break,
please return to your respective agendas.***