

# 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  
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Federal ID # 13-6162067  
Tax Exempt

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***25th Annual Spring Tax Day  
Credit Suisse Securities (USA) LLC  
11 Madison Avenue, Level 2B  
New York, NY 10010  
June 17, 2010***

**FIDUCIARY SECTION AGENDA**

<b><u>Time</u></b>	<b><u>Topic</u></b>	<b><u>Speakers</u></b>
<b><i>12:30 – 1:00 PM</i></b>	<b><i>Registration</i></b>	
<b><i>1:00 – 1:05 PM</i></b>	<b><i>Opening Remarks</i></b>	<b><i>Adam S. Rosenberg Chairman, CBIT Henry Lievre Fiduciary Chairman, CBIT</i></b>
<b><i>1:05 – 2:00 PM</i></b>	<b><i>Estate &amp; GST Tax Repeal: The current state of the law</i></b>	<b><i>Jay D. Waxenberg Proskauer Rose LLP</i></b>
<b><i>2:00 – 3:00 PM</i></b>	<b><i>Managing the Global Legacy: Transferring Wealth to U.S. Beneficiaries Anticipating tax issues and avoiding Punitive consequences</i></b>	<b><i>Andrew S. Auchincloss Bernstein Global Wealth Management</i></b>
<b><i>3:00 – 3:15 PM</i></b>	<b><i>Coffee Break</i></b>	
<b><i>3:15 – 4:10 PM</i></b>	<b><i>Grantor Trusts: Simple or Complex? A Closer look at the complexities Of Sections 671-679</i></b>	<b><i>Michael Macero &amp; Richard Wise KPMG, LLP</i></b>
<b><i>4:10 – 5:00 PM</i></b>	<b><i>State and Local Tax Update: Select hot topics facing the Industry<sup>1</sup></i></b>	<b><i>Jeffrey B. Gotlinger Ernst &amp; Young, LLP</i></b>
<b><i>5:00 – 7:00 PM</i></b>	<b><i>Cocktail Reception</i></b>	

<sup>1</sup> CLE Credits are not anticipated for this course