

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 S. Reale, Co-Chairman
Michael T. Cartusciello, Co-Chairman
John J. Gallagher, Vice-Chairman
James R. Housman, Secretary
Michael Swiader, Treasurer

Federal ID # 80-0574679
Tax Exempt

Website: www.cbit-usa.org

Address all communications to:

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***41th Annual Fall Tax Day
Credit Suisse Securities (USA)LLC
1 Madison Avenue
New York, NY 10017***

November 9, 2010

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 8:55	Registration – Sponsors - Coffee	
8:55 – 9:00	Opening Remarks	Adam S. Rosenberg Chairman, CBIT Henry Lievre Fiduciary Chairman, CBIT
9:00 – 10:15	Planning in a Low Interest Rate Environment	Blanche Lark Christerson Deutsche Bank Private Wealth Management
10:15 – 10:30	Morning Break	Sponsor Room
10:30 – 11:10	The Tax Legislation Crystal Ball - The Effect of the November Elections	Donald R. Longano Pricewaterhouse Coopers LLP
11:10-12:00	Generation Skipping Opportunities for 2010	Martyn S. Babitz Hawthorn, PNC Family Wealth

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12:00 – 2:00*

Lunch

Luncheon Speaker *Gus Faucher, Director*
Current Tax Issues and the Economy *Moody's Analytics*

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

Step-Up Takes a Step Down: *Michael F. Macero*
The impact of a 2010 death on the *Richard Wise*
Continuing Basis of a Decedent's *KPMG LLP*
Property; and planning for the 1041

3:15 – 3:30

Afternoon Break **Sponsor Room**

3:30 – 4:20

Private Foundations – Recent *Larry J. Abowitz*
Developments & Traps for the *Ernst & Young, LLP*
Unwary

4:20-5:00

Cost Basis: The ABC's of *Steve Neiss*
Identification of Covered & *Broadridge Financial Services*
Non-Covered Securities¹

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.***