

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.

Adam S Rosenberg, Chairman
James R Housman, Vice-Chairman
Michael Swiader, Secretary
June Goettert, 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

***42nd Annual Fall Tax Day
Credit Suisse Securities (USA)LLC
1 Madison Avenue
New York, NY 10017***

November 10, 2011

FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
8:00 – 8:55	Registration – Sponsors - Coffee	
8:55 – 9:00	Opening Remarks	James R Housman <i>Vice-Chairman, CBIT</i> Henry Lievre <i>Fiduciary Chairman, CBIT</i>
9:00 – 10:15	New Proposed 67(e) Regulations – IRS Latest Bundle of Joy!	Samuel Hercules <i>Ernst & Young</i> Charles R Cangro <i>Ernst & Young</i>
10:15 – 10:30	Morning Break	Sponsor Room
10:30 – 11:10	Regulatory Update; Cost Basis Reporting Law	Stevie Conlon <i>Wolters Kluwer Financial Services</i>
11:10-12:00	A Planner's Guide to These Uncertain Times	Blanche Lark Christerson <i>Deutsche Bank Private Wealth Management</i>

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12:00 – 2:00*

Lunch

Luncheon Speaker

*Robert Glennon
Hogan Lovells*

***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

Making Two Years Last a Lifetime

*Andrew Auchincloss
Bernstein Global Wealth
Management
Paul D Wilson
Bernstein Global Wealth
Management*

3:15 – 3:30

Afternoon Break

Sponsor Room

3:30 – 5:00

***Time is Near to File Tax Returns for
2010 Deaths – What Should We Do?***

*Albert J Vernacchio
PricewaterhouseCoopers*

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.***