

# CBIT Education Inc.

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Federal ID # 80-0574679  
Tax Exempt

Website: [www.cbit-usa.org](http://www.cbit-usa.org)

Address all communications to:

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

*26th Annual Spring Tax Day  
Credit Suisse  
11 Madison Avenue  
New York, NY 10017  
June 28th, 2011*

## FIDUCIARY AGENDA

<u>Time</u>	<u>Topic</u>	<u>Speakers</u>
12:30 – 1:00 PM	Registration	
1:00 – 1:05 PM	Welcome & Opening Remarks	James R Housman Vice Chairman, CBIT Henry Lievre Fiduciary Chairman, CBIT
1:05 – 2:05 PM	FATCA – The Basics	<b>Dominick Dell’Imperio</b> PricewaterhouseCoopers <b>Robert Limerick</b> PricewaterhouseCoopers
2:05 – 3:05 PM	A Passport To Foreign Trusts: Identification, Tax Reporting, and Various Disclosure Requirements	<b>Michael F Macero</b> KPMG LLP <b>Richard Wise</b> KPMG LLP
3:05 – 3:15 PM	Afternoon Break	
3:15 – 4:00 PM	Basis Reporting and Wash Sales, What’s New	<b>Ken Novak</b> Thomson Reuters OneSource Trust Tax
4:00 – 5:00 PM	Recent Estate Planning Developments	<b>Sandy Schlesinger, JD, Partner</b> Schlesinger Gannon & Lazetera LLP
5:00 – 7:00 PM	Cocktail Reception	