

TAXATION, PROBATE & TRUST LAW SECTION

IDAHO STATE BAR

MISSION, GOALS AND STRATEGIC PLAN

Mission:

The mission of the Taxation, Probate & Trust Law Section of the Idaho State Bar is to efficiently provide its members and the general public throughout Idaho with the resources to broaden their knowledge in the areas of tax, probate and trust law through education, interaction with government employees and personal contact.

Background:

Recognizing the importance of establishing a mission statement and goals and of developing methods and strategies to accomplish said mission and goals, the governing board of the Taxation, Probate & Trust Law Section of the Idaho State Bar met on May 14, 2009 to discuss and develop said mission, goals, and methods and strategies.

A draft of said mission, goals and strategic plan was circulated to the Governing Council of the Section on August 25, 2009. A final version of said mission, goals and strategic plan was circulated to the members of the Section on September 22, 2009.

Vision

The governing board of the Taxation, Probate & Trust Law Section of the Idaho State Bar established the mission statement, goals and strategic plan contained herein in an effort to give direction to the current and subsequent governing boards of the Section in making decisions with respect to the expenditure of Section funds, coordination of Section activities, events or functions and to provide general guidance regarding governing board decisions.

Goals:

1. To provide direct benefits to members of the Section
2. To perform public service in the areas of Taxation, Probate and Trust law

Goal 1

To Provide Direct Benefits to Section Members

According to comments by many Section members, the highest priority of the Section should be to provide direct benefits to the members of the Section. The Section governing board is committed to providing direct benefits to the Section members by providing opportunities to increase the taxation, probate and trust law knowledge of the members; to strengthen Section member relations; to expand the influence of the Section and the Section members; and to keep Section fees and other costs at a reasonable level.

Objective 1: Increasing Section member knowledge

The Section has provided and should continue to provide quality opportunities for Section members to increase their knowledge in the areas of taxation, probate and trust law. Through the Continuing Legal Education Committee of the Section, legal education seminars – including the annual estate planning seminar in Sun Valley – have been held for Section members. In addition, some Section members have volunteered countless hours to produce and publish informational materials, including forms books, which assist members of the Idaho State Bar with taxation, probate and trust matters. In keeping with technological advancements, the Section governing board intends to investigate and possibly start a Section blog or listserv to provide an opportunity for Section members to discuss issues relating to taxation, probate and trust law.

STRATEGY 1: Continue to support, plan and host quality continuing legal education seminars.

STRATEGY 2: Continue to support, plan and publish quality publications in the areas of taxation, probate and trust law.

STRATEGY 3: Investigate and possibly implement a Section blog or listserv to give Section members an opportunity to discuss issues relating to taxation, probate and trust law issues. Continue to expand the content on the Section's website.

STRATEGY 4: Provide financial support to Section officers who attend the annual meeting of the National Association of State Bar Tax Sections. Obtain input from such attendees for ideas on improving the Section.

Objective 2: Strengthen Section Member Relations

The Section has provided and should continue to provide well thought-out opportunities for Section members to socialize, interact and strengthen professional relationships with each other. In addition to continuing legal education seminars, the Section has and should continue to plan, support and host Section events or functions whose primary purpose is to give Section members an opportunity to interact and strengthen those professional relationships.

STRATEGY 1: Plan, support and host social events such as Section dinners, happy hour events and sponsor tables for Section member attendance to selected community and charitable events. Expand Section attendance at the regular monthly meetings, including the attendance of short legal education seminars.

STRATEGY 2: Conduct informal and/or formal surveys and discussions with Section members regarding other Section events that would provide a reasonable and effective opportunity for Section members to socialize.

Objective 3: Expand Influence of Section and Section Members

The Section should make every reasonable effort to expand the Section's influence with respect to the development of local, state and federal taxation law and state probate and trust law while working within the

rules and regulations set by the Idaho State Bar. In addition, the Section should provide opportunities for Section members to participate in the development of such areas of the law.

STRATEGY 1: Plan and hold discussions between Section members and local, state and federal government officials and employees.

STRATEGY 2: Host regular dinners for Tax Court Judges when they have an Idaho docket.

Objective 4: Maintain Reasonable Fees and Other Section Costs

The Section should make every reasonable effort to ensure that Section membership is affordable to members of the Idaho State Bar.

STRATEGY 1: Monitor Section dues to ensure they are consistent with dues charged by other Sections of the Idaho State Bar and are reasonable in relation to the benefits provided to the Section members.

STRATEGY 2: Consistently evaluate other Section costs (such as continuing legal education fees) and ensure such costs are reasonable in relation to the benefits provided to the Section members and are in line with other continuing legal education opportunities in taxation, probate and trust law.

Goal 2

To perform public service in the areas of Taxation, Probate and Trust law

As a Section of the Idaho State Bar, Section members have a responsibility to "aid in the advancement of the administration of justice." One of the goals of the Idaho State Bar is to "promote the public's access to legal services." The Section members are committed to giving their time, talents and resources to further these goals as they relate to the administration of taxation, probate and trust law in the State of Idaho.

Objective 1: Give Financial Support to Worthy Causes Related to the Section

The Section has provided and should continue to provide financial support to charitable organizations whose efforts are worthy of support, as determined by the Section governing council and Section members, and whose efforts have some relation to taxation, probate and trust law.

STRATEGY 1: Accept financial or grant requests from charitable organizations and make a timely determination of whether to support such requests.

STRATEGY 2: Develop Section guidelines in determining whether a grant request should be supported by the Section.

STRATEGY 3: Discuss financial or grant requests which have not previously been supported by the Section during regular Section meetings to ensure that any such grant has support of the Section members.

Objective 2: Expand Access to Necessary Taxation, Probate and Trust Legal Services to Those Who Cannot Otherwise Afford Them

The Section should lead efforts across the State of Idaho to ensure that necessary taxation, probate and trust law services are available to those who cannot otherwise afford such services.

STRATEGY 1: Organize and operate programs which give the general public, especially those members of the general public who cannot afford necessary legal services, access to taxation, probate and trust law services.

STRATEGY 2: Publicize and encourage Section members to participate in current programs such as volunteering at the Boise Senior Center and Ask-A-Lawyer Program of Law Day.

STRATEGY 3: Create a volunteer coordination program to develop volunteer opportunities and develop matches between those opportunities and Section members.