

IDAHO STATE BAR
TAXATION, PROBATE & TRUST LAW SECTION
AGENDA
February 9, 2016

- 1. Call to Order/Attendance.**
- 2. Approval of Prior Meeting Minutes.**
- 3. General Business.**
 - a.** Introduction of New Section Officers/Recognition of Outgoing Chair
 - b.** 2016 Look ahead
 1. Next Meeting – April 12th/Any suggested CLE Topics/Volunteer Presenters
 2. Estate Planning Basics CLE – Continue at Law Center May of 2016/Other Locations in State
 3. Gem State Tax Symposium June 3, 2016 – John McGown
 4. ISB Annual Meeting Boise/The Riverside Hotel – July 13th thru 15th ; Tax Section to Sponsor a CLE—Proposal Due February 26th; Have sponsored in 2015, 2013 thru 2011 & 2009
 5. Annual Advanced EP Seminar September 30th thru October 1st Boise/Riverside Hotel; Reception September 29th
 - c.** Discussion Items Related to 2016 Calendar:
 1. Estate Planning Basics: Date/Time/Place? Topics?
 2. Annual Meeting CLE – Suggested Topic: “Five estate Planning Tools of the New Paradigm” or “Die Broke and on Medicaid”
 - d.** US Tax Court/Judge Vasquez in Boise April 11, 2016; Tax Section to Host dinner?
 - e.** Present Financial Report for December 2016 and 2016 Budget – Robert J. Green
 - f.** Elder Law Subsection/Committee: Volunteers to serve on Initial Committee: Sarah K. Mello, Pam Massey, Nathan Palmer, Kimmer Callahan
 - g.** Other Business?

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4. Committee Reports:

Legislative Committee (TEPI): Robert Aldridge.

CLE Committee. Natasha N. Hazlett

Tax Liaison. John McGown and Robert Aldridge

Probate & Guardianship Form Book Update – Bob Aldridge

- 5. CLE:** Eric L. Olsen: *Family Limited Entities and Other Useful Tidbits for the Estate Planner*
- 6. Next meeting** – April 12, 2016 at Noon- Idaho Law Center.