

**IDAHO STATE BAR**  
**TAXATION, PROBATE & TRUST LAW SECTION**

**Proposed Minutes of Section Meeting of June 8, 2010**

1. **Call to Order.** The meeting was called to order by Mark McBride, Section Chairperson, at noon June 8, 2010 at the Law Center. Section members in attendance, in addition to the Chairperson, were:
  - a. In Person – Donna Schuyler, James Kaufman, John McGown, David Hyde, Carla Ranum, Bruce Thomas, Sandra Clapp, Natasha Hazlett, Erick Shaner and James Manning; and
  - b. By Telephone – Jace Richards.
2. **Prior Meeting Minutes.** Approval of the minutes of the last meeting of the Section, April 13, 2010, was deferred.
3. **Presentations.**
  - a. Barbara Locke explained the activities and needs of the Tax Clinic sponsored by the University of Idaho College of Law, and its intended use of a grant from the IRS Taxpayer Advocate Service.
  - b. Corrie Kellar and Tammy Brown from the staff of the Idaho Supreme Court discussed conservator accounting as required by Idaho Code §§15-5-418 and 419, and the court review procedure with respect to such accounting, which review procedure is being administered by the Idaho Supreme Court staff. Corrie and Tammy explained that the committee working on implementing court review of these accountings would now turn to guardianship accountings, and that an online training program was being developed for guardians and conservators.
4. **Committee Reports and Assignments.**
  - a. Legislative Committee (TEPI) – Robert Aldridge reported the committee was discussing and considering uniform acts dealing with jurisdictional issues in guardianship proceedings and real property transfer at death.
  - b. Public Service Committee – No new developments to report.
  - c. CLE Committee – Report of plans for presentations at the Idaho State Bar Annual Convention and the Annual Advanced Estate Planning Seminar in September.

- d. Newsletter Committee – Erick Shaner reported the Section’s ListServ is working well and has extensive use by Section members.
  - e. Tax Liaison Committee – John McGown advised that the minutes of the Committee’s last meeting are posted on the Section’s website.
  - f. Probate and Guardianship Form Books Committee – James Kaufman advised that most of the forms had been reviewed and discussed, and that the Committee would continue its work in the Fall.
5. **Additional Business.** Mark McBride reported on the “*Meet the IRS*” event, and Robert Aldridge discussed the Idaho legislative developments of interest to the Section members.
6. **Next Meeting.** September 10, 2010, at the Section’s Annual Advanced Estate Planning Seminar.

Meeting adjourned at 1:10 p.m.