

IDAHO STATE BAR  
TAXATION, PROBATE AND TRUST LAW SECTION

Minutes of Section Meeting of April 12, 2011

1. Call to Order. The meeting was called to order by Ron Caron, Section Chairperson, at Noon MST on April 12, 2011 at the offices of the Idaho State Tax Commission located at 800 Park Blvd., Boise, Idaho. Section members in attendance, in addition to the Chairperson, were:

In Person – James Kaufman, Carla Ranum, Chelsea Kidney, Bob Aldridge, Jim Manning, David Cooper, Tim Tarter, Kellie Kuster, William Whitaker, David Wikon, Bill von Tagen, Phil Skinner, Bruce L. Thomas, John McGown, William Vasconcellos, Richard Smith, Mark McBride.

By Telephone – Chris Moore, Paul Agidius, Edwina Wager, Craig Taylor, Susan Wilson, Brian McMahan, Judy Ruud, and Amy Kingston.

2. Recognition of prior Chair. A plaque was presented to Mark McBride for his work in chairing the Tax Section during 2010.
3. Prior Meeting Minutes. Minutes from the September 2010, November 2010 and the February 8, 2011 meetings were distributed. Following a motion made and seconded, the minutes were approved.

4. CLE Programs.

Presentation on the Idaho State Tax Commission by recently appointed chairperson, Robert Geddes, Commissioner.

5. Committee Reports:

- a. Legislative Report (TEPI) – Robert Aldridge:

All TEPI supported bills passed with the exception of the Estate Tax bill that is pending governor's signature. Bob will prepare a written report on bills.

- b. Public Service Committee – No Report.

- c. CLE Committee – No Report. Will be meeting on April 21st to firm up plans for Sun Valley.

- d. Newsletter Committee – No Report.

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- e. Tax Liaison Committee – John McGown & Bob Aldridge – John reported that Tax Section continuing interaction w/ IRS. They have scheduled an early May meeting w/ IRS to discuss problems encountered during the tax filing season and how they can be resolved.
  - f. Probate and Guardianship Formbook. – Report by Bob Aldridge. Book is presently stalled. The Committee is now working to determine how to proceed.
6. CLE to be presented at the Annual Meeting July 13-15 in Sun Valley.
- a. Medicaid Estate Recovery Issues – Estate of Perry presentation by Pete Sisson
  - b. Innocent Spouse Relief/Federal Trust Fund Taxes – presentation by Tim Tarter
  - c. Tax Panel Discussion w/ Bob Aldridge and John McGown – possibly a third – to speak on general tax updates, both federal and state.
7. Financial Report. – No Report. Donation requests have started coming in – time will be set aside at June meeting for advocates to come in and make presentations re: donations.
8. Next Meeting – Tuesday, June 14, 2011, then, September 9<sup>th</sup> in Sun Valley.
9. Meeting Adjourned @ 12:56pm.

Respectfully submitted:

*Chris J. Moore*

Chris J. Moore, Secretary/Treasurer