

IDAHO STATE BAR
TAXATION, PROBATE AND TRUST LAW SECTION
Meeting of November 08, 2011

1. **Call to Order.** The meeting was called to order by Ron Caron, Section Chairperson, at Noon MST on November 8, 2011 at the offices of the Idaho Law Center, Boise, Idaho. Section members in attendance, in addition to the Chairperson, were:
 - A. **In Person** – Robert Aldridge, Jonathan Cavanagh, James Kaufman, Joe Kozlowski, D. James Manning, John McGown, William Vasconcellos, Donna Schuyler, Matthew Taylor, Chris Brown, Natasha Hazlett, and Michael Thomas.
 - B. **By Telephone** – Chris Moore, Kimmer Callahan, Kara Glecker, Eric Ludlow, Judith Rudd, Susan Wilson and Jay Friedly.
2. **Prior Meeting Minutes.** Minutes from the June 14, 2011, meeting were distributed and approved as submitted.
3. **Committee Reports:**
 - A. **Legislative Report (TEPI)** – Robert Aldridge: Currently working on Idaho tax bill passed last year related to withholding and other issues regarding entity payment of taxes. For this year, working on some conservatorship / guardianship matters
 - B. **Public Service Committee** – Vicki Meier – No report.
 - C. **CLE Committee** – Allen Bosch, David Cooper, Deb Cordes, Nick Marshall & Sharon Powers. David Cooper. Reviewed Sun Valley meeting & started looking for speakers for next year. Looking through comments.
 - D. **Newsletter Committee** – Erick Shaner – No Report.
 - E. **Tax Liaison Committee** – John McGown & Bob Aldridge – Next meeting will be in about a week – November 16 – 8:00 am to Noon at IRS.
 - F. **Probate and Guardianship Formbook.** – Bob Aldridge, Steve Alkire, Jim Kaufman, Mel Fisher, and Joe Uberuaga. Book is presently stalled. The Committee is now working to determine how to proceed. Zero books left. May need to print some more probate form books – 3rd Edition still current.

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4. NOMINATION AND ELECTION OF SECTION OFFICERS FOR 2012:

Chair:		D. James Manning – Moffatt, Thomas, Barrett, Rock & Fields, Chtd.
Vice-Chair:		Christopher J. Moore – Creason, Moore, Dokken & Geidl, PLLC
Secretary/Treasurer:		Natasha Nassar Hazlett – Angstman Johnson
Governing Council: Assists Chair and vice-chair in various matters.	1	Barbara Zanzig Lock – University of Idaho College of Law
	2	Kimmer W. Callahan – Callahan & Associates, Chtd.
	3	Judi Rudd

All elected by acclamation.

Jim Manning, incoming chair, reported on Washington DC trip. – Wonderful experience. National Association of State Bar Tax Sections. Working to encourage state tax authorities to provide more meaningful review of tax disputes. Also discussed state tax nexus issues. CLE presentations – one by Takisha McGee – one of 8 attorneys staffing office of professional responsibility. Karen Hawkins – new director of IRS Office of Professional Responsibility – deals with practice enforcement issues – Circular 230, etc. Very worthwhile meeting.

5. CLE Programs.

The *Federal Estate Tax: Past, Present and Future* – John McGown, Jr. – Hawley Troxell.

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6. Other business:

CLE to be presented at the Headline News program sponsored by the Idaho Law Foundation.

1. Tax Update – D. James Manning – Pocatello November 18
2. Tax Update – Christopher J. Moore – Lewiston December 2
3. Tax Update – Bob Aldridge – Meridian December 2

7. Financial Report. – No Report.

8. Next Meeting – February 14th, 2012, under the leadership of Jim Manning.

9. Meeting Adjourned @ 1:05pm.

Respectfully submitted:

Chris J. Moore

Chris J. Moore, Secretary/Treasurer

REGULAR MEETING

November 08, 2011

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