

TAXATION, PROBATE & TRUST LAW SECTION
MEETING AGENDA
April 11, 2023

1. Call to Order/Attendance

2. General Business Overview

a. Announcements

Upcoming CLE Opportunities

8th Annual Estate Planning Basics, Friday, May 19, 2023 9:00 AM – 12:15 PM MT.
– Kimmer Callahan

2023 Estate Planning Conference – September 27-29, Shore Lodge, McCall, ID

b. Financial Report – To complete required “spend down” of funds, the Tax Section recently contributed \$20,000 to the Low Income Tax Clinic at the University of Idaho School of Law, and \$1,697 to the Idaho Academy of Leadership for Lawyers.

c. Tax Liaison Report – John McGown: IMRS Monthly Conference

3. Next Meeting – June 13, 2023 at noon

4. CLE – James Carpenter, ChFC, CLU, CIMA, CAP, Fidelity Charitable

Report your [CLE attendance here](#) after the meeting. If you submitted your attendance before the meeting, please resubmit it.