

**IDAHO STATE BAR**  
**TAXATION, PROBATE & TRUST LAW SECTION**  
**AGENDA**  
*November 9, 2021*

1. **Call to Order/Attendance.**
2. **General Business Overview.**
  - a. Announcements:
    1. Call for nominations for officers and at-large position.
    2. Current nominations:
      - i. Chairperson: Dave Bagley – Racine Olson, Pocatello
      - ii. Vice-Chairperson: David Cooper – Northwest Trustee and Management Services, Boise
      - iii. Secretary/Treasurer: Aaron D. Roepke, Westberg Roepke Moore, Moscow
      - iv. At-Large Council Members:
        - a. Stephanie Hansen, Borton-Lakey, Meridian
        - b. Tricia Daigle, Daigle Law Office, PLLC, Boise
    3. Ballot will be sent Monday.
  - b. Financial Report – David Cooper
  - c. Other business:
    1. Begin in person section meetings with video options.
3. **Committee Reports -**
  - a. Legislative Committee (TEPI) - Robert Aldridge
  - b. CLE Committee - Kimmer Callahan
  - c. Tax Liaison - Robert Aldridge and John McGown
  - d. Probate & Guardianship Forms Book - Robert Aldridge
4. **Next Meeting** – To be announced.
5. **CLE – Idaho Custodial Trust Act**  
Dennis Voorhees

