

IDAHO STATE BAR
TAXATION, PROBATE, AND TRUST SECTION
February 11, 2020 Meeting Agenda

- I. **Call to order/attendance**
- II. **Approval of prior meeting minutes (November 12, 2019).**
- III. **General business.**
 - a. Financial report.
 - i. Current report: Dave Bagley
 - ii. Surplus report: Ty A. Ketlinski
 - b. Other business –
- IV. **Committee reports.**
 - a. Legislative Committee – Robert Aldridge
 - b. CLE Committee – Kimmer Callahan
 - c. Tax Liason – Robert Aldridge and John McGown
 - d. Probate and Guardianship Forms Book – Robert Aldridge
- V. **Calendar**
 - a. Next meeting: June 9, 2020, 12:00 P.M.
 - b. Estate Planning Basics: May 4, 2020, Boise
 - c. Annual Estate Planning Conference: September 23-25, 2020, Ketchum
- VI. **CLE** – Kimmer Callahan, “THE SECURE ACT, An Introduction and Overview.”