

IDAHO STATE BAR
TAXATION, PROBATE & TRUST LAW SECTION
AGENDA
November 12, 2019

- 1. Call to Order/Attendance.**
- 2. Approve Meeting Minutes held on (7/25/2019) at the Idaho State Bar Annual Meeting**
- 3. General Business Overview.**
 - a. 2019 Idaho State Bar Annual Meeting Report – Kimmer Callahan
 - b. Joint Meeting BEPC - Nancy G. Henderson, *Putting Life Back Into Stale Irrevocable Trusts Through Trust-to-Trust Transfers* (Boise/Live Webcast) on December 16, 2019 12:00 pm, Boise Centre, Webcast – register online
 - c. 2020 Officers – proposed slate
 1. Ty Ketlinski – Chairperson
 2. Paul Burris – Vice Chairperson
 3. Dave Bagley – Sec/Treasurer
 - d. Financial Report – Paul Burris
 - e. Other business:
- 4. Committee Reports -**
 - a. Legislative Committee (TEPI) - Robert Aldridge – no report
 - b. CLE Committee - Kimmer Callahan
 1. 2020 Estate Planning Conference
 - c. Tax Liaison - Robert Aldridge and John McGown
 - d. Probate & Guardianship Forms Book - Robert Aldridge – no report
- 5. Next Meeting** – February 2020 - Law Center, 525 W. Jefferson, Boise, ID
- 6. CLE** – *Key Family Business Dynamics*
Bradley Fisher, Featherstone Holdings, LLC, Salt Lake City, Utah