

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

*November 13, 2018.*

- 1. Call to Order/Attendance.**
- 2. Approval of Prior Meeting Minutes (July 19, 2018)**
- 3. General Business Overview.**
  - a. Election of Officers**

Slate of Officers Presented to the Section:

    1. Chair – C. Edward Cather, Parsons Behle & Latimer, Idaho Falls
    2. Vice-Chair –Ty Ketlinski, Ketlinski Law Offices, Meridian Idaho.
    3. Sec./Treasurer Nomination – (currently unfilled), and
    4. Outgoing Chair – Robert J. Green, Kootenai Law Group, PLLC.

At Large Members:

Barb Lock, University of Idaho College of Law,  
Kimmer Callahan, Callahan and Associates, Chtd.,  
Chris Moore, Creason, Moore, Dokken & Geidl, PLLC,  
Natasha Hazlett, Angstman Johnson.
  - b. The 2018 ISB Tax, Probate, and Trust Law Section Annual Estate Planning Conference in Boise was held on September 20 – 21, 2018. This year’s conference was a huge success!**
  - c. The Section has teamed up with the Boise Estate Planning Council again this year to co-sponsor a CLE on December 5, 2018 featuring Regional Wealth Strategist for U.S. Bank, Ed Morrow.**
  - d. Financial Report (including board’s current discussion of any 2018 spend down that may be necessary) – Ty Ketlinski.**
  - e. Other business: ?**
- 4. Committee Reports –**
  - a. Legislative Committee (TEPI) – Robert Aldridge.**
  - b. CLE Committee - Kimmer Callahan or Designee.**
  - c. Tax Liaison – Robert Aldridge and/or John McGown.**
  - d. Probate & Guardianship Forms Book - Robert Aldridge.**

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- 5. Next Meeting** – February 12, 2019 at 12:00 (MT) at The Law Center (525 W Jefferson St, Boise, ID 83702)
  
- 6. CLE** – Boise Attorney with C.K. Quade Law, PLLC, **Lance Pounds**, will present a half hour CLE on: “ABLE Accounts: Eligibility, Creation, Contributions, Distributions, Limitations, and Strategies”