

IDAHO STATE BAR
TAXATION, PROBATE, AND TRUST SECTION
Meeting dated February 13, 2018

1. Call to order/attendance

Section Chair Robert J. Green called the meeting to order at 12:07.

2. Approval of prior meeting minutes

Mr. Green announced the new Secretary/Treasurer Ty A. Ketlinski will present the November 2017 and February 2018 meeting minutes for approval at the next Section meeting on April 10, 2018.

3. General Business

a. Presentation of Officers

Mr. Green presented the names of the new Section officers.

b. 2017 Carryover spend down

Mr. Green summarized how the section spent down the 2017 budget surplus, and a discussion ensued.

c. 2018 Idaho State Bar Annual Meeting

Mr. Green stated asked if anyone was interested in providing a speaker to the 2018 ISB Annual Meeting this year regarding the new tax legislation. Mr. Green asked those interested to contact him ASAP by the end of next week.

d. Spring Estate Planning CLE

Donna Skylar provided a report about the Spring Estate Planning CLE on April 9th from 1 pm to 5 pm.

e. Annual Estate Planning Conference

Mr. Green provided a summary financial report for the 2017 Estate Planning Conference.

f. Financial Report February 2018

Mr. Green provided a current financial report for the section.

4. Committee reports

a. Legislative Committee (TEPI)

Robert Aldridge reported on the committee's efforts, including current legislation in front of the Senate. The Committee is also looking into the new tax legislation to determine what, if any, changes need to be made to Idaho law.

b. CLE Committee

Ms. Skylar already gave this report earlier in the meeting.

c. Tax Liaison

John McGown briefly explained his and Mr. Aldridge's role as tax liaisons.

d. Probate & Guardianship Forms Book

Mr. Aldridge had already addressed this issue previously in the meeting.

5. Next Meeting – Currently scheduled for April 10, 2018

6. Other business

At Mr. McGown's suggestions, each live member of the meeting took some time to introduce themselves.

7. CLE

Mr. Green presented a CLE on artificial intelligence and the law.

8. Meeting adjourned at 1:07