

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

November 14, 2017.

- 1. Call to Order/Attendance.**
- 2. Approval of Prior Meeting Minutes (4/11/17 and 7/13/17)**
- 3. General Business Overview.**
 - a. Election of Officers**

Slate of Officers Presented to the Section:

 1. Chair – Robert J. Green, Kootenai Law Group, PLLC
 2. Vice-Chair – C. Edward Cather, Parsons Behle & Latimer, Idaho Falls.
 3. Sec./Treasurer Nomination – Ty Ketlinski, Ketlinski Law Offices, Meridian Idaho.
 4. Outgoing Chair – Chelsea Kidney, Office of the Attorney General.

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. Section Charitable Donations:**
 1. University of Idaho, College of Law - \$2500
 2. Concordia Law School - \$2500
 3. Idaho Academy of Leadership for Lawyers - \$2,500
 - c. Idaho Military Legal Alliance Wills Clinic, Section Sponsorship**

September 8, 2017, report.
 - d. Elder Law Survey Summary – Ty Ketlinski.**
 - e. Annual Estate Planning Conference, September 22-23, 2017, report.**
 - f. Financial Report November 2017.**
 1. Additional Donations approved
 - i. \$20,000 Scholarship funds.
 - ii. TEPI - \$1000 earmarked to update forms books
 - iii. Idaho Law Library – any remainder.

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g. December 4, 2017: FREE CLE – Richard Oshins, J.D., LL.M., M.B.A., Oshins Associates, Las Vegas Nevada. “The Modern Trust: The Art of Properly (and Effectively) Passing and Receiving Wealth.” In person and webcast attendance available. Please RSVP to Jenny Swajkoski at jss@mcananey.us by November 27th.

h. Other business:

4. Committee Reports –

- a.** Legislative Committee (TEPI) – Robert Aldridge.
- b.** CLE Committee - Natasha Hazlett or Designee.
- c.** Tax Liaison – Robert Aldridge and John McGown.
- d.** Probate & Guardianship Forms Book - Robert Aldridge

5. CLE – Kimmer Callahan, Callahan and Associates. “Estate Planning for Families with Children”

6. Next Meeting – February 13, 2018– Law Center, 525 W. Jefferson, Boise, ID.