

IDAHO STATE BAR
TAXATION, PROBATE & TRUST LAW SECTION
April 12, 2016 Meeting Minutes

1. Meeting was called to order at 12:00 by Eric Olsen.
2. Eric presented the February **Meeting Minutes for approval, which were approved by those attending.**
3. **General Business:**
 1. Eric announced that the next Section Meeting will be held at the ISB Annual Meeting Boise/The Riverside Hotel at 8:00. There will not be a CLE portion to this meeting. Breakfast is included.
 2. Eric also announced that Kimmer Callahan will present Introduction to Revocable Trusts-May 23rd at the Law Center.
 3. John McGown discussed the Gem State Tax Symposium which will be held on June 3, 2016.
 4. Natasha Hazlett presented the anticipated speaker list for the Annual Advanced EP Seminar which will be held on September 30th thru October 1st Boise/Riverside Hotel. The Speaker List is attached. A reception will be held on September 29.
- b. John McGown reported on US Tax Court/Judge Vasquez dinner on April 11, 2016. The event was well attended. Students of the University of Idaho's LTC were present. Judge Vasquez expressed his appreciation for the hospitality of the Section in hosting.
- c. Eric Olson presented Financial Report for December 2016 and 2016 Budget.
- d. Elder Law Subsection/Committee discussed a carryover topic from the fall: Volunteers to serve on Initial Committee: Nathan Palmer, Kimmer Callahan will spearhead the Committee.
- e. Other Business:
 1. A donation request from Concordia was discussed. Several options were presented: 1) make an equal contribution to the University of Idaho Law School, 2) wait until the end of year to see if there is a surplus, 3) if there is a surplus, reduce membership fees to allow members to make contributions individually, and 4) offer scholarship in exchange for assistance with Section Forms. No action was decided at this meeting and set aside for further discussion at a later time.

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4. Committee Reports:

Legislative Committee (TEPI): Robert Aldridge.

CLE Committee. Natasha N. Hazlett

Tax Liaison. John McGown and Robert Aldridge – John expressed his appreciation for IRS staff, an agency that is underfunded and overworked.

Probate & Guardianship Form Book Update – Bob Aldridge

5. **CLE:** Eric L. Olsen presented the CLE titled “Ethical Considerations for the Tax Practitioner”
6. Meeting convened at 1:05 p.m.
7. **Next meeting** – July 13, 2016 at 8:30 am at Riverside Hotel