

**Regulatory Services Department**  
**Meeting Minutes**

January 11, 2022  
9:00 a.m. Remote Meeting

**Members Present**

- David Bastian, Chair
- Caitlin Finley
- Kim Chose
- Derek Matthews
- Gail Kelsie
- Tom Peterson
- Bill Ronhaar
- Angela Balconi
- Lori Smith

**Liaisons and Staff Present**

- Jon Burke, WSBA Staff Liaison
- Katherine Skinner, RSD Analyst
- Carla Higginson, BOG Liaison
- Renata de Carvalho Garcia, RSD Director
- Bobby Henry, RSD Associate Director

- The meeting was called to order at 9:00 a.m. The Chair confirmed that a quorum was present
- The Board approved the October 5, 2021 Meeting Minutes.
- **LP Forms.** The board discussed two requests that the board consider adding a Deed of Reconveyance and Substitution of Trustee Form. The board decided that it was unnecessary for LPOs to prepare deeds of reconveyance and declined to add that form. The board decided to add the Substitution of Trustee form to the LP Form bank. The Forms Committee will prepare the Substitution of Trustee form and present it for final approval to the LP Board at the March meeting.
- **Joint Tenancy with Right of Survivorship.** The board discussed the implications of LPOs preparing documents where the purchaser is Joint Tenancy with a Right of Survivorship (JTROS). Many firms with LPOs refer parties to a lawyer when they want to use a JTROS. It appears that the JTROS implicates providing legal advice and/or legal services. The board voted to take no action authorizing LPOs to prepare documents that include a JTROS or to provide information on how to create a JTROS.
- **TAXICAB Task Force.** Tom Petersen presented the issues involved in the memo prepared by the TAXICAB task force that interprets and defines the relationship between Supreme Court created boards and the WSBA under GR 12.3. The board reviewed and discussed TAXICAB's memorandum section by section. The board voted to approve the TAXICAB memorandum with the exception that it included a few typographical/grammar errors.
- The board welcomed new board member Angela (Angie) Belconi. Angela will introduce herself at the next board meeting.



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- New Committee assignments. Angela Belconi will replace David Bastian on the Exam Committee. Bill Ronhaar will be on call if needed. WSBA staff will try to schedule a meeting of the Exam Committee for next week. Angela Belconi will also replace David Bastian on the Rules Committee.
- The meeting adjourned at approximately 10:20 a.m.

Respectfully submitted,

Jon Burke

WSBA Staff Liaison to the LPB

