

# WASHINGTON STATE BAR ASSOCIATION

## WSBA ENTITY ANNUAL REPORT FORM

FY 2023: October 1, 2022 – September 30, 2023

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards<sup>1</sup>), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year FY2023 (October 1, 2022 – September 30, 2023). Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and the staff liaison.

**Submission Deadline is Friday, October 13:** please submit by emailing [barleaders@wsba.org](mailto:barleaders@wsba.org) or requesting that your staff liaison submit the report internally.

<b>Name of Entity:</b>	Real Property Probate & Trust Section
<b>Entity Size:</b> <i>Total Number of Entity/Section Executive Committee Positions</i>	13 voting and 8 ex officio
<b>Chair or Co-Chairs:</b>	Anna M Cashman
<b>Staff Liaison:</b> <i>Include name, job title, and department if known</i>	Carolyn MacGregor
<b>Board of Governors Liaison(s):</b>	Todd Bloom  Click or tap here to enter text.
<b>Purpose of Entity:</b> <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
The purpose of the Section is to: (a) Assist our members in achieving the highest standards of competence, professionalism, and ethics in their practices,(b) Assist the Legislature in the enactment and improvement of the laws affecting real property, probate, trusts, and estates and to assist the Judiciary in the just administration of those laws, (c) Support the WSBA with regard to those matters which concern the practice of law in the areas of real property, probate, trusts and estates, and (d)Otherwise serve our members by helping them realize their professional goals.	

October 1, 2022 – September 30, 2023 (FY23)

<b>Strategy to Fulfill Purpose:</b>	
<p>For FY 2023-2024, the RPPT Section will continue to work with the WSBA to engage and educate members and lawyers in general with high quality CLEs and an in-person Mid-Year meeting, a timely newsletter and listserv and other opportunities for members and lawyers in the community to get involved with education and the general improvement of the practice of our areas of law. The Section will continue to work closely with legislative leaders, the Section’s legislative subcommittee and executive committee to ensure that the laws affecting real property, probate, trusts and estate continue to evolve with the practice and provide a good framework for practitioners and meet the needs of the state’s general population.</p>	
<b>How does the entity’s purpose help further the mission of the WSBA “to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice”?</b>	
<p>Through member engagement and education, the RPPT Section provides opportunities for education, mentoring and practical support for its members and Washington lawyers in general with an emphasis on providing timely resources for the ever-changing practice of law, responding to requests from legislators and otherwise reviewing pending legislation to address access to justice issues and developing the next generation of practitioners.</p>	
<b>2022-2023 Entity Accomplishments:</b>	
<p>The biggest accomplishments in 2022-2023 were the continuation of Section membership (as evidenced by our roster numbers) and our in-person only Annual Mid-Year Meeting at the Marcus Whitman in Walla Walla. Our Section had a tremendously successful Mid-Year meeting, while also hosting several hybrid and online only continuing legal education presentations (with speakers both remote and present). Section leaders and members also worked together with WSBA leaders and legislators on multiple legislative subcommittees to assist with the review, comment and drafting of bills in the 2022-2023 legislative year, including testifying at several bill hearings at the legislature. The RPPT Section continues to engage new and young lawyers through the Fellow Program and fosters those relationships and mentors the newer practitioners who frequently serve as executive committee members for the Section following completion of their service as Fellows.</p>	
<b>Looking Ahead: 2023-2024 Top Goals &amp; Priorities:</b>	
<b>1</b>	Continue to maintain high standards and produce high-quality, relevant CLE programs and newsletter articles for the education and benefit of members, practitioners and Washingtonians.
<b>2</b>	Continue mentoring and engaging new and young lawyers through the Fellows program, offering scholarships to the Midyear and opportunities for participation as seminar speakers and newsletter authors.
<b>3</b>	Continue to lead practitioners by providing resources in a changing and dynamic practice area.
<b>4</b>	Continue to work closely with legislators and WSBA staff to assist in changes to laws relating to the areas of real property, probate, trusts and estates.
<b>5</b>	Continue to work closely with WSBA leaders and staff to ensure a robust partnership for the benefit of Washington lawyers and the public.

**Please describe how this entity is addressing diversity, equity, and inclusion:**

*How have you elicited input from a variety of perspectives in your decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?*

Diversity continues to be an important issue to RPPT and the RPPT is intentional in ensuring that diversity is a top priority in leadership and engagement for CLEs and newsletter articles. When recruiting individuals to serve on the RPPT executive committee, join the Section, serve as seminar speakers and newsletter authors, RPPT makes significant efforts to be inclusive. As a result of these efforts RPPT is doing very well in maintaining diversity in areas it can control: gender, age, ethnicity, small firm/large firm, geography.

**Please share feedback regarding the support and engagement provided by WSBA.**

*For example:*

- *Quality of WSBA staff support/services, including technology solutions*
- *Involvement with Board of Governors, including assigned BOG liaison(s)*
- *Ideas you have for ways WSBA can continue to strengthen/support your entity.*

Click or tap here to enter text.

**SECTIONS ONLY: Please quantify your section’s 2022-2023 member benefits:**

*For example:*

- *\$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

0	Newsletters/publications produced
0	Mini-CLEs produced
5	Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA
0	Co-sponsored half-day, full-day and/or multi-day CLE seminars with <i>non-WSBA</i> entity
1	Receptions/forums hosted or co-hosted
\$1,000	Scholarships, Donations, & Grants
1	New Lawyer Outreach events/benefits
Click or tap here to enter text.	Other (please describe): Click or tap here to enter text.

**SECTIONS ONLY: Please quantify your section’s 2022-2023 legislative activity.**

PT: SB 5173 SB 5318	Bills Reviewed
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	HB 1400 HB 1420 SB 5443 SB 5482	
	PT: HB 1795 (monitored but no position) HB 1484 (tracked and took position in support) SB 5589 (tracked and took position in support)	Bills tracked
	PT: 0	Comments proposed
	PT: SB 5589	Bills proposed/drafted
<b>Entity Detail Report: To Be Completed by WSBA Staff</b>		
<b>Number of Entity Members/Section Executive Committee Members:</b>		14
<b>Number of Section Members:</b> <i>As of September 1, 2023. Note: The Section Membership year runs on the calendar year.</i>		2,260
<b>Number of Applicants for FY24 Positions:</b> <i>October 1, 2023 – September 30, 2024</i>		5
<b>Do you have vacant positions for the coming year, FY24?</b>		No
<b>FY23 Budgeted Direct Expenses:</b> <i>As of September 30, 2023. For Sections, this does not include the Per-Member-Charge.</i>		<b>\$121,938</b>
<b>FY23 Total Direct Expenses:</b> <i>Draft estimate as of Dec. 1, 2023 For Sections, this does not include the Per-Member-Charge.</i>		<b>\$86,353</b>

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<sup>i</sup> Supreme Court Boards (Access to Justice Board, Disciplinary Board, LLLT Board, Limited Practice Board, MCLE Board and Practice of Law Board) provide annual reports to WSBA to support its responsibility under [GR 12.3](#), to provide oversight and monitor compliance with applicable rules and orders. Boards have the option to use the WSBA template or to share their annual reports to the Washington Supreme Court.