

# 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>	WSBA Taxation Section
<b>Entity Size:</b> <i>Total Number of Entity/Section Executive Committee Positions</i>	650/28
<b>Chair or Co-Chairs:</b>	Megan Tahl
<b>Staff Liaison:</b> <i>Include name, job title, and department if known</i>	Carolyn MacGregor
<b>Board of Governors Liaison(s):</b>	Brent Williams-Ruth (At Large)  Nam Nguyen (District 10)
<b>Purpose of Entity:</b> <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
The purposes of the Section are to further the knowledge of the members and the Bar in areas of the law involving federal, state, and local taxation, and to assist in the activities of WSBA and further the interests of the legal profession.	
<b>Strategy to Fulfill Purpose:</b>	

We strive to host events providing member benefit, whether for networking, for further continued legal education on a variety of tax topics, by offering scholarships, and furthering relationships among private practitioners and government attorneys.

**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”?**

We work to provide CLEs for all members on a variety of topics, we support the tax clinics with donations which furthers representation for low-income taxpayers in WA and helps provide training for LLM students, we encourage member volunteer work with the federal tax clinics, and we continue to sponsor the Tax Section scholarship to promote opportunities for law students seeking to practice in the tax field in Washington. The structure of the Tax Section also encourages collaboration, with the co-chair model, and partnering government practitioners with private practitioners on both the state and federal side.

**2022-2023 Entity Accomplishments:**

The Taxation Section built out the Diversity, Equity, and Inclusion Chair Committee and activities for the Executive Council. This increased investment in DEI has allowed our members to continue to learn and grow in their DEI knowledge. Additionally, we continued to successfully operate subcommittees as we transitioned out of the COVID-19 pandemic; we revised the mission statements and goals for all Taxation Section committees, which are now finalized and ready for the Taxation Section’s website; we expanded the Taxation section website to include more information and opportunities for members; the Taxation Section awarded a \$5,000 scholarship to a student pursuing an LLM degree; we held our annual luncheon in person for the first time since 2019 and had an esteemed outside speaker. Subcommittees held a variety of discussions on topics ranging from international tax updates to estate and gift planning legislation, etc.

**Looking Ahead: 2023-2024 Top Goals & Priorities:**

<b>1</b>	<b>Increase engagement with Section members by holding networking events</b>
<b>2</b>	<b>Provide Section members with mini-CLEs and other CLE opportunities regarding emerging issues and practical topics</b>
<b>3</b>	<b>Sponsor DEI-focused CLE for Taxation Section members</b>
<b>4</b>	<b>Encourage young tax attorneys in law school or pursuing LLMS by providing stipends to fund unpaid summer internship/externship work in tax positions</b>
<b>5</b>	<b>Increase pro bono service and involvement in low-income taxpayer clinics and explore other avenues for similar service.</b>
<b>6</b>	<b>Update Taxation Section website with DEI committee information and resources.</b>
<b>7</b>	<b>Create a mentorship program for young tax professionals.</b>

**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?*

The Taxation Section expanded our DEI activities with the help of our new committee and co-chairs. We have implemented a mentorship program for young tax professionals. Our intention is to expand this program to college and high school individuals. We are also hosting additional events and CLE focused in the area of DEI and expanding the website to provide resources in the area of DEI.

**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.*

Carolyn MacGregor and Noah Baetge are wonderful and act as invaluable liaisons to the WSBA. As we further our DEI efforts, they have guided us regarding WSBA policies and practices. We would support any additionally activities to promote the section via the overall WSBA and we are pleased with the expansion of the Taxation Section website.

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

*For example:*

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

<p><b>SECTIONS ONLY: Please quantify your section’s 2022-2023 member benefits:</b></p> <p><i>For example:</i></p> <ul style="list-style-type: none"> <li>• <i>\$3000 Scholarships, donations, grants awarded;</i></li> <li>• <i>4 mini-CLEs produced</i></li> </ul>	0	Newsletters/publications produced
	2	Mini-CLEs produced
	Click or tap here to enter text.	Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA
	Click or tap here to enter text.	Co-sponsored half-day, full-day and/or multi-day CLE seminars with <i>non</i> -WSBA entity
	3	Receptions/forums hosted or co-hosted
	3	Scholarships, Donations, & Grants
	Click or tap here to enter text.	New Lawyer Outreach events/benefits
	Click or tap here to enter text.	Other (please describe): Click or tap here to enter text.
	2	Bills Reviewed

<b>SECTIONS ONLY: Please quantify your section's 2022-2023 legislative activity.</b>	2	Bills tracked
	0	Comments proposed
	0	Bills proposed/drafted
<b>Entity Detail Report: To Be Completed by WSBA Staff</b>		
<b>Number of Entity Members/Section Executive Committee Members:</b>	28	
<b>Number of Section Members:</b> <i>As of September 1, 2023. Note: The Section Membership year runs on the calendar year.</i>	622	
<b>Number of Applicants for FY24 Positions:</b> <i>October 1, 2023 – September 30, 2024</i>	9	
<b>Do you have vacant positions for the coming year, FY24?</b>	Yes - 3	
<b>FY23 Budgeted Direct Expenses:</b> <i>As of September 30, 2023. For Sections, this does not include the Per-Member-Charge.</i>	<b>\$45,002</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>\$24,654</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.