

WASHINGTON STATE BAR ASSOCIATION

WSBA SECTION ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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 Boardsⁱ), 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 October 1, 2023 – September 30, 2024. 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 staff liaison.

Submission Deadline is Friday, October 11: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

Name of Section:	Real Property, Probate and Trust
Chair or Co-Chairs:	Nathan G. Smith
Staff Liaison: <i>(include name, job title, and department if known)</i>	Carolyn MacGregor, Sections Program Specialist, Advancement Department
Board of Governors Liaison:	Matthew Dresden
Purpose: <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.	
Strategy to Fulfill Purpose:	
For FY 2024-2025, the RPPT Section will continue to work with the WSBA to engage and educate members and lawyers in general with high quality online CLEs and an in-person Mid-Year meeting, continue to prepare timely newsletters and provide a listserv and other opportunities for members and lawyers in the community to get involved with education and the general improvement of the	

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<p>practice of our areas of law. The Section will further engage with newer members of the Section to advance their practices and encourage their participation in Section activities. 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>	
<p>How does the section’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”?</p>	
<p>Through member engagement and education the 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>	
<p>Top 2023 -2024 Section Accomplishments:</p>	
<p>(1) The Section had a very successful Midyear meeting at The Davenport Hotel in Spokane and continued to provide for hybrid learning through seasonal CLE offerings.</p>	
<p>(2) Membership of the Section worked together with WSBA leaders and legislators on multiple subcommittees to review, comment and prepare additional bills for review by the legislature.</p>	
<p>(3) The Section engaged new and young lawyers through both its Fellow Program and its Young Lawyer Liaison to the Board of Governors.</p>	
<p>(4) The Section returned to the publication of its Newsletter by publishing 3 different issues.</p>	
<p>Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound</i> Use this worksheet (under ‘Leadership’) to develop your SMART goals and then summarize below in 1-2 sentences.</p>	
1	<p>The Section has the goal of providing 4 Newsletters to its membership on a regular seasonal publication schedule.</p>
2	<p>The Section has the goal of simplifying its internet presence over the course of the year by using WSBA supported internet infrastructure and its own Section sponsored website.</p>
3	<p>The Section has the goal of providing two young lawyer events at diverse geographic locations in the State.</p>
<p>Looking Ahead: <i>Please share any long-term goals and/or priorities that your entity aims to address.</i></p>	
1	<p>The Section remains committed to growing its membership enrollment by providing for direct member benefits in education and networking.</p>

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2	The Section is interested in developing young leadership in its ranks through the use of its Fellows program as a way to increase engagement and participation.
3	Continue to work closely with the legislature and WSBA leaders and staff to ensure a robust partnership for the benefit of Washington lawyers and the public on matters of real property, probate and trust.
<p>Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in 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 in the profession? Other?</i></p>	
<p>The Section focuses on diversity, equity and inclusion by using its Listserv as a means of communicating initiatives from the Section. The Section provides scholarships to members to offset the costs of attending its co-sponsored Continuing Legal Education programs.</p>	
<p>Please share feedback regarding the support and engagement provided by WSBA. <i>For example:</i></p> <ul style="list-style-type: none"> • <i>Quality of WSBA staff support/services, including technology solutions</i> • <i>Involvement with Board of Governors, including assigned BOG liaison</i> • <i>Ideas you have on ways WSBA can continue to strengthen/support your entity.</i> 	
<p>WSBA staff provides outstanding support to the Section for its activities, initiatives and CLE planning. The Section is participating in the pilot program for the WSBACommunity as a way to maintain Section documentation and enhance communication among the Executive Committee.</p>	
<p>Please quantify your section’s 2023-2024 member benefits: <i>For example:</i></p> <ul style="list-style-type: none"> • <i>\$3000 Scholarships, donations, grants awarded;</i> • <i>4 mini-CLEs produced</i> 	
Co-sponsored the RPPT Midyear Meeting at The Davenport Hotel in Spokane and 4 online full-day CLE seminars with WSBA.	Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA
	Co-sponsored half-day, full-day and/or multi-day CLE seminars with <i>non</i> -WSBA entity.
1 reception at the Section Midyear meeting.	Receptions/forums hosted or co-hosted
\$5534.96	\$ amount given through donations/scholarships/grants.
3 Newsletters	Newsletters/publications produced
	Mini-CLEs produced

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1 event at the Section Midyear meeting	New Lawyer Outreach events/benefits		
	Recognitions/Awards given		
<p>The Section actively participated in the legislative session. The Section reviewed the following bills on the Probate and Trust side: SSB 5787; SB 5825; HB 1867; ESSB 5589. The Section tracked the following Bills: 3SSB 5787 (UEEPDA; tracked and initially took a position in opposition); ESSB 5589 (changes to 11.54; tracked and took a position in favor); HB 1867 (estate tax return requirement; tracked only). The Section proposed comments on the following bills on the Probate and Trust side: SSB 5787 (The Section convened a practitioners workgroup to prepare suggested changes, which were incorporated in the bill.). The Section participated in the following bills as proposed or drafted on the Probate and Trust side: ESSB 5589 (The Section engaged in the drafting of earlier versions of this bill, and this work continued this year resulting in the bill’s passage.). In connection with the Section’s work on the Real Property side, it reviewed 148 bills. The Section tracked 10 bills on the Real Property side: HB 1890 (Tracked only); SB 5796 opposed (WUCIOA; Tracked and took a position in opposition); ESHB 1998 (tracked only); SB 5840 (Lease notarization; Tracked and took a position in favor); ESHB 2003 (Tracked only); SHB 2012 (Tracked only); 2SHB 2071 (Tracked only); HB 2375 (Tracked only); SSB 5840 (Tracked only); SB 6238 (Tracked only). The Section provided potential comments on SB 5796, but did not ultimately proposed alternative comments. The Section provide proposed legislation for SB 5840 on the Real Property side.</p>	Other (please describe):		
SECTION DATA <i>To Be Completed by WSBA Sections Team</i>			
Section Membership Information:	2202		Membership Size: <i>(As of September 30, 2024)</i>
	\$119,896		FY24 Revenue (\$): For Sections Only: <i>As of September 30, 2024</i>
	\$114,700	\$69,560	Budgeted and Direct Expenses:

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			<i>Does not include the Per-Member-Charge. For Direct Expenses, draft estimate as of December 3, 2024.</i>
Section Executive Committee Information:	13 elected and 10 nonvoting members	Size of Executive Committee: <i>(include and specify voting and non-voting positions)</i>	
	5	Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25).</i>	
	5	Number of Applicants for FY25: <i>Applications submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>	

ⁱ 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.