



WASHINGTON STATE BAR ASSOCIATION

Taxation Section

1. Call to Order, Attendance, Approval of Minutes Meetings

- Called to order: 8:06am
- April 21, 2023
 - Minutes approved?

2. Treasurer's Report (Jason Harn)

- Budget discussion regarding member dues
- Increase in member charge to fully cover donations to scholarship but tabled the discussion because were returning to annual luncheon
- Member charge has been set for the year (\$18.73 / member)
- Will not increase dues and re-evaluate after lunch and in the fall

3. New/Ongoing Items

- Meeting dates for next year / break until September
 - Discussed April meeting falling just after tax deadline
 - Discussed changing to second Friday of every month but scrapped in favor of just modifying the April meeting
- Goodbye/congrats to Dan Jensen & elect DOR co-chairs for liaison (Tina Poley & Kimberly Anderson)
 - Kimberly introduced herself to the group
 - Need to provide statement of interest for section voting
 - Moved and seconded to appoint to add as DOR liaisons
 - Vote approved
- Restart the Newsletter
 - Has been a request to re-start the newsletter
 - Fell off about 4 years ago
 - Cadence was 4 times a year
 - Bob: challenge was getting good content in a timely manner
 - Rich: another difficulty was that Bar wanted to review everything
 - Carolyn: would not use the newsletter to make super timely messaging; depends also on whether we want to format or want to use WSBA's desktop publisher; 2 weeks process after submission; no Section is doing the print version anymore
 - Darek: we had moved to all PDF, but could consider a mailing option as well
- Luncheon update
 - Registration will be up next week on WSBA's website
 - Recommend that tell colleagues that it will be at the WAC so don't automatically go to Columbia Center, and just generally publicize
 - Reach out to LLM program
- Consider amending Bylaws
 - Allow email voting

- Consider how to get more involvement in board (current time to be treasurer – 2.5 years serving on EC as committee member)
 - Reduce time to 1.5 years
 - Allow inactive members on board
- Draft → general counsel review → BOG vote required
- Kristi gave an overview of the issues at play here
- Carolyn will investigate whether GC's office would be open to email voting
- Discussion of whether to pursue amendment to reduce service time – tabling for now
- New Capital Gains Tax administration
 - Megan – challenges with administration, account set up and payment through the DOR; issued with tracking WA source income in tiered entity structure; no method of enforcement from her perspective
 - Bob: possibly have a CLE or town hall where folks can come with their questions and concerns
 - Kimberly sits on the CG group internally and would be interested in seeing a task force and / or getting more information about this topic out there
 - Bob: downside of seeking feedback from DOR
 - Megan, Aaron and Bob to take offline – Al and Jay also interested

4. Committee / Liaison Reports, Ideas, Goals

- Estate & Gift Tax (Cat Connell & Reed Jones)
 - i. Moving last committee meeting back to June 9
- International Tax (Al A. Sierra)
- Transactional Tax (Dan Sito)
 - i. Nothing to report
- IRS Liaison (Logan Westerman & Rich Johnson)
 - i. Nothing to report
- DOR Liaison (Dan Jensen)
 - i. Nothing to report beyond new liaisons
- Legislative (Brett Durbin & Callie Castillo)
 - i. Nothing new to report
- Communications & Website (Jay Jetter)
 - i. Did send out WSBA blast about June conference rebate
- Young Lawyers (Daniel French)
 - i. Nothing to report
- Outreach/Scholarship (Jennifer Gellner)
 - i. No report
- Pro Bono Committee (Darin Jensen)
- State & Local Tax (SALT) (Aaron Johnson)
 - i. CLE is moving forward in Eastern Washington
- CLE (Sofia Meglioli & Jason Harn)
- DEI (Ellen Tung & Jessica Bejerea)
 - i. Two CLEs offered by the ABA
 - ii. LGBTQ tax forum on ABA
 - iii. Meeting with equity and justice team to continue further two options discussed last month
 - iv. WSBA membership demographic study launching next month – e-survey week of June 19

1. Thinks there should be some promotion through our section or by committee leaders

- Board of Governors Liaison (Brent Williams-Ruth & Nam Nguyen)

5. Adjourn – 9:03am

Meeting Dates for 2022 - 2023

Time: 8:00-9:00 a.m.

Location: Virtual Meeting Only

Date:

September 16, 2022
 October 21, 2022
 November 18, 2022
 December 16, 2022
 January 20, 2023
 February 17, 2023
 March 17, 2023
 April 21, 2023
 May 19, 2023
 Annual Luncheon, Date 6/15/2023 (tentative location)
 June 16, 2023

Current Executive Committee Members for 2021-2022

Name	Main Phone	Email	Committee Position	Employer
Claire Taylor	206-892-2192	claire.taylor@stokeslaw.com	Immediate Past Chair	Stokes Lawrence PS
Kristi Richards	206-623-6501	krichards@radiuslawseattle.com	Chair	Skellenger Bender
Megan Tahl	206-716-6830	mtahl@deloitte.com	Chair Elect	Deloitte Tax LLP
Cat Connell	206-370-7847	cat.connell@klgates.com	Secretary/Estate & Gift Tax Co-Chair	K&L Gates
Jason Harn	206-223-0800	jharn@colvinhallettlaw.com	Treasurer / CLE Co-Chair	Colvin & Hallett
Reed Jones	206.292.3607	Reed.A.Jones@wellsfargo.com	Estate & Gift Tax Co-Chair	Wells Fargo
Open			International Tax Co-Chair	Open
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Dan Sito	206-359-6424	DSito@perkinscoie.com	Transactional Tax	Perkins Coie
Logan Westerman		Logan.M.Westerman@irs.counsel.treas.gov	IRS Liaison Co-Chair	IRS Counsel
Jay Jetter	206-386-7533	jay.jetter@stoel.com	Communications & Website Chair	Stoel Rives
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Kimberly Anderson		KimberlyA@dor.wa.gov	Proposed Co-DOR Liaison	WA DOR
Richard Johnson	206-357-5084	rjohnson@lesourd.com	IRS Liaison Co-Chair	LeSourd & Patten, P.S.
Aaron Johnson	206-223-7430	johnsona@lanepowell.com	State & Local Tax	Lane Powell

Sofia Meglioli	206-716-6529	smeglioli@deloitte.com	CLE Co-Chair	Deloitte Tax LLP
Jennifer Gellner	425-235-5535	jennifer@gellnerlawgroup.com	Scholarship Chair	Gellner Law Group
Daniel French	206-973-8298	dfrenchtax@gmail.com	Young Lawyer	WA Dept. of Revenue.
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Ellen Tung	310-592-7159	tellen@uw.edu	DEI Co-Chair	Tax LLM Candidate
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