

WASHINGTON STATE BAR ASSOCIATION

WSBA ENTITY ANNUAL REPORT

FY 2022: October 1, 2021 – September 30, 2022

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 Boards¹), 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, 2021 – September 30, 2022. 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 Monday, October 17: Please submit by emailing to Sections Program Specialist Carolyn MacGregor at carolynm@wsba.org.

Name of Entity:	WSBA Tax Section
Chair or Co-Chairs:	Kristi Richards
Staff Liaison: <i>(include name, job title, and department if known)</i>	Carolyn MacGregor
Board of Governors Liaison:	Nam Nguyen, District 10; Brent Williams-Ruth, At Large
Purpose of Entity: <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.	
Strategy to Fulfill Purpose:	
We strive to host events and maintain an informational website 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"?	

The Section works 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.

2021 -2022 Entity Accomplishments:

The Tax Section continued to successfully operate committees and hold events during COVID-19 restrictions; it monitored the ongoing WSBA workgroup issues; it continued to work with the Tax Court to support pro bono assistance to taxpayers; the Taxation Section awarded a \$5,000 scholarship as well as donations to the two tax clinics in the state of Washington to support low income taxpayer assistance; the estate planning subcommittee held ongoing informative CLEs and discussions on a variety of useful topics.

Looking Ahead: 2022-2023 Top Goals & Priorities:

1	Increase engagement with Section members by holding in-person networking events and virtual events, including receptions for tax judges
2	Provide Section members with mini-CLEs and other CLE opportunities regarding emerging issues and practical topics
3	Continue to address DEI for the Section members and committee
4	Increase pro bono service and involvement in low income taxpayer clinics, tax court needs, and explore other avenues for similar service.
5	Contribute reasonable input to legislature on proposed tax laws related to taxpayer due process with DOR and general unintended consequences related to proposed tax law changes and updates

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 continues to support the DEI co-chairs in efforts to provide education to and seek input from the board, committees, and membership

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*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

We have had limited interaction with the BOG liaison but have felt supported by the WSBA staff who are available to answer questions and provide guidance.

<p>SECTIONS ONLY: Please quantify your section's 2021-2022 member benefits:</p> <p><i>For example:</i></p> <ul style="list-style-type: none"> • \$3000 Scholarships, donations, grants awarded; • 4 mini-CLEs produced 	Click or tap here to enter text.	Newsletters/publications produced
	3	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	Zoom Townhall EC meeting (encourage involvement); reception/happy hour; tax commissioner Rettigreception
	1	Recognitions/Awards given (\$5,000 scholarship / tax LLM student)
	1	New Lawyer Outreach events/benefits
	2	Other (please describe): (2021 \$2K donations; 2022 \$1K donations to UW/Gonzaga tax clinics)
	Click or tap here to enter text.	Other (please describe):
<p>SECTIONS ONLY: Please quantify your section's 2021-2022 legislative activity.</p>	Click or tap here to enter text.	Bills reviewed
	Click or tap here to enter text.	Bills tracked
	Click or tap here to enter text.	Comments proposed
	Click or tap here to enter text.	Bills proposed/drafted

**Entity Detail & Demographics Report:
To Be Completed by WSBA Staff**

Size of Entity:	28
Membership Size: (for Sections Only) <i>(As of September 30, 2022)</i>	626
Number of Applicants for FY23 <i>(October 1, 2021 – September 30, 2022)</i>	26
Number of current volunteer vacancies for this entity	0
FY22 Revenue (\$): For Sections Only: <i>As of September 30, 2022</i>	\$12,788.06
Direct Expenses: <i>As of September 30, 2022. For Sections, this does not include the Per-Member- Charge.</i>	\$22,070.28

¹ 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.