

Minutes
October 7, 2022

The meeting of the Mandatory Continuing Legal Education Board was called to order by Board Chair Todd Alberstone at 10:00 AM on Friday, October 7, 2022. The meeting was held via videoconference. Board members in attendance were:

Todd Alberstone, Chair
Asia Wright
Efrem Krisher
Merri Hartse
Katie Denmark

Liaisons and Staff in attendance:

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| Adelaine Shay | MCLE Manager/MCLE Board Staff Liaison |
| Ransom Smith | MCLE Analyst |
| Bobby Henry | Associate Director, Regulatory Services Department |

Review of Minutes

The MCLE Board reviewed the minutes from the August 5, 2022 meeting. The Board unanimously approved all minutes without change.

Discussion: Goals for 2022-2023

The MCLE Board discussed generally the goals to adopt for 2022-2023. In connection with this discussion, a vote was taken on whether to amend language within the Board’s official goals document to track with the new Equity-Ethics requirement’s “mitigation of bias” language. The Board voted unanimously to amend the document for this purpose. Also pursuant to this discussion, the Board voted on the prospect of forming a subcommittee tasked with considering suggested rule amendments that would establish specific MCLE requirements in the areas of mental health and technology. The Board voted unanimously to form a subcommittee for this purpose.

Discussion: Review of the Structured Mentoring Program Application before the Board

The MCLE Board had before it an application submitted by Seattle Intellectual Property Inn of Court to have its mentorship program obtain official approval as an approved structured mentoring program pursuant to APR 11(e)(8). Under such a designation, licensed legal professionals would be allowed to claim mentoring credit by virtue of having participated in the program (provided that all requirements

set forth in APR 11(e)(8) are fulfilled). The Board discussed the standards of approval applicable generally. A vote was taken on whether to approve the application to become a structured mentoring program. The Board voted unanimously to approve the program.

Discussion: General Rule 9 Coversheet

The MCLE Board reviewed a draft version of the General Rule 9 Coversheet for the suggested amendment which would allow law clerk tutors to claim credit for the personal supervision of those participating in the tutoring program. This coversheet was to be presented to the Supreme Court of Washington no later than October 15 in accordance with GR 9(e)(2).

Discussion: Appointment of Vice Chair

The MCLE Board took a vote on appointing MCLE Board member Efrem Krisher to the position of Vice Chair. The vote was to appoint Efrem as Vice Chair was approved with one abstention.

Discussion: Support of TAXICAB draft document:

The MCLE Board discussed generally a document set forth by the TAXICAB (Task Force Administering Xenial Involvement with Court Appointed Boards) as a leading policy document. Some Board members believed that a particular section of the document (section 3.3) should be amended prior to adoption. The Board took a vote to support the document with this revision and voted unanimously to support it.

MCLE Updates

The MCLE Staff Liaison discussed general updates with MCLE, including the provision of notice of upcoming MCLE deadlines for the current 2020-2022 reporting period, an update on the meeting of the WSBA Task Force Administering Xenial Involvement with Court Appointed Boards (TAXICAB), progress on the new MCLE online system, and recent additions to MCLE staff.

MCLE Board Activity Review

The MCLE Board decided by motion on one activity accreditation request. No listing of these motions is included in order to protect member confidentiality.

MCLE Hardship Petitions

The MCLE Board decided by motion on 1 hardship petition. No listing of these motions is included in order to protect member confidentiality.

Adjournment

There being no further business at hand, the meeting was adjourned at 12:00 PM. The next regularly scheduled MCLE Board meeting will be held at 10:00 AM on Friday, January 13, 2023.

Respectfully submitted,

A handwritten signature in cursive script, appearing to read "Adelaine Shay".

Adelaine Shay
MCLE Board Staff Liaison

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| DISCUSSION: WSBA CLE Accreditation of Self-Study Components |
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Summary: At the October 7, 2016 MCLE Board meeting, the Board reaffirmed its previous decision from 2012 to allow WSBA CLE to accredit recorded courses with self-study components in accordance with APR 11. The MCLE Board decided to reaffirm its decision using accreditation methodology described below. WSBA CLE is providing an update on the success of the self-study components within their programs and asking the MCLE to reaffirm its previous decision for both online and in-person CLEs.

Background:

2016 Request from WSBA CLE for accreditation of self-directed study within an online CLE course:

Assuming compliance with all other standards for approval and accreditation the following were the requested and approved by the MCLE Board accreditation guidelines for WSBA CLE course with self-study components:

1. Request accreditation of interactive elements in online learning modules that do not have continuous audio or video components but intersperse short audio and/or video segments throughout the module.
2. Request accreditation of self-study activities that are included as part of an online learning module.
3. Request accreditation of time required to complete quizzing and knowledge checks in online learning modules.

Methodology for requesting MCLE credits for self-directed online modules:

1. A review group composed of active WSBA members who practice in the subject area covered by the online module will be established to review the online module content for accuracy and provide estimated completion times for interactive elements, quizzing, and self-study incorporated into an online module. The estimated completion times will be used to arrive at a reasonable time allocation to request MCLE credits for these portions of the module.
2. Any audio/video elements will be valued at actual run time.
3. The combination of audio/video run times and estimated self-directed study times will be compiled to arrive at a requested total MCLE credit value submitted on the activity application.

Discussion:

- Should the MCLE Board reaffirm its 2016 decision to allow accreditation of recorded courses with self-study components in accordance with APR 11 for both online and live CLE courses?
- Should WSBA CLE continue to use the previously agreed upon accreditation methodology?

Attachments:

- WSBA CLE Presentation Materials
- MCLE Board Decision Letter – dated October 10, 2016



WSBA CLE - PRACTICE PRIMER/HOMEWORK ACCREDITATION UPDATE TO MCLE BOARD

Kevin Plachy, WSBA Advancement Department Director

Shanthi Raghu, WSBA Education Programs Manager

ACCREDITATION OF SELF STUDY IN ONLINE MODULES

- Permission was granted by the MCLE Board in October 2016 after a presentation by WBSA CLE (approval letter attached in materials)
- At the time of approval WSBA CLE explained that the approval was sought in anticipation of the development of “Learning Tracks” that are a series of educational programs that build upon one another and delivered in sequenced order.
- The “Learning Tracks” were eventually branded as WSBA Practice Primers.

WSBA PRACTICE PRIMERS

- The courses are developed in live format (offered via webcast and in person) and then converted to an on-demand seminar.
- Take a substantive area of law and develops a series of learning tracks (usually three) that build upon one another (see Practice Primer flyer in materials)
- The self-study (i.e. homework) is usually assigned at the end of Track 1 and reviewed in Track 2 and another homework assignment is assigned at the end of Track 2 and reviewed in Track 3.
- We follow the methodology approved by the MCLE Board in 2016 to accredit the homework (i.e. utilize a review group comprised of expert faculty and WSBA staff to assign a reasonable time allocation for completion of homework and credits).
- This has resulted in most homework assignments being assigned an optional .5 CLE credit for a total of 1 CLE credit for each Primer Series.

WSBA PRACTICE PRIMERS ATTENDANCE STATISTICS

- 480 Members Attended the Full Program of Live Practice Primers (i.e. all three tracks)
- To date, 600 Full Practice Primer Tracks have been purchased on demand.
- To date another 700 have been purchased as separate sessions on-demand.
- These are targeted to New Members or those looking to enter a new practice area.
- New Members receive a 71% discount off the normal seminar price schedule (both live and on-demand)

WSBA PRACTICE PRIMERS HOW WOULD YOU RATE THE PROGRAM OVERALL? EVALUATION RESPONSES

- FY17 Parenting Plans = 5 out of 5 overall (low response rate)
- FY17/18 Estate Planning = 4.43 out of 5
- FY18 Business Law = 4.79 out of 5
- FY19 Employment Law = 4.3 out of 5
- FY20 Criminal Law = 4.5 out of 5
- FY21 Family Law = 4.21 out of 5
- FY23 Estate Planning = 4.68 out of 5

WSBA PRACTICE PRIMERS EVALUATION COMMENTS

The materials were concise, the "exhibits" (forms) were gargantuan, and the deeply experienced speaker provided both high level big picture and targeted practical pointers on what the materials contained and how the issues actually present on the ground (with real clients.) – FY23 Estate Planning Practice Primer

Probably the most useful CLE I have attended to date. Great presentation style, outstanding written materials. Bravo all around. – FY23 Estate Planning Practice Primer

I've been really impressed with Tracks 1 and 2 for the amount of information covered and how applicable it is in practice. These are some of the best CLEs I've attended in my 11 years as an attorney and the presenters have been great. - FY 21 Family Law Practice Primer

Excellent practical presentation accompanied by detailed response to questions. – FY18 Business Law Practice Primer

CONCLUSION

- Inclusion of homework into the learning modules reinforces learning and the ability to accredit the homework provides an incentive for completing it.
- The faculty embrace the concept of developing homework assignments that build upon one another to provide practical application of the educational content.
- WSBA CLE will continue with the Practice Primers and would like a reaffirmation from the MCLE Board that including accreditable homework into the live and on-demand learning modules can also continue.

THANK YOU!

Questions?



WSBA
REGULATORY SERVICES DEPARTMENT

MCLE

phone: 206-733-5987
e-mail: mcle@wsba.org

October 10, 2016

Kevin Plachy
WSBA CLE
1325 4th Ave, Suite 600
Seattle, WA 98101

RE: Request for MCLE Accreditation of Self-Directed Online Training Modules

Dear Kevin:

Thank you for coming to the October 7, 2016 MCLE Board meeting to explain how WSBA CLE interactive online learning modules are going to be developed. The Board sees a lot of value in the use of practical training as a way to transfer legal knowledge and skills. Therefore, the Board has decided to reaffirm its 2012 decision to accredit self-directed online training modules in accordance with the previously agreed upon methodology.

Please notify us as soon as the first online module is available as at least of the Board members would like to audit it and offer feedback.

Sincerely,

A handwritten signature in cursive script, appearing to read "Renata de Carvalho Garcia".

Renata de Carvalho Garcia
MCLE Manager

Sent via email

Working Together to Champion Justice

Washington State Bar Association • 1325 Fourth Avenue, Suite 600 / Seattle, WA 98101-2539 • 206-733-5987 / www.wsba.org



WSBA

To: MCLE Board
From: Kevin Plachy, Education Programs Manager
Re: MCLE accreditation of online training modules
Date: September 23, 2016

This is a request of the MCLE Board to reaffirm its 2012 accreditation of self-directed study within an online CLE course.

Assuming compliance with all other standards for approval and accreditation the following are requested expansions to accreditation guidelines for self-study:

1. Request accreditation of interactive elements in online learning modules that do not have continuous audio or video components but intersperse short audio and/or video segments throughout the module.
2. Request accreditation of self-study activities that are included as part of an online learning module.
3. Request accreditation of time required to complete quizzing and knowledge checks in online learning modules.

The rationale for the request to change the accreditation is substantially the same as in 2012.

Additional reasons, beyond those articulated in the 2012 memo, are that WSBA CLE is undertaking an initiative to create substantive learning tracks geared toward new attorneys and those transitioning into a new area of practice. These learning tracks will contain skills based trainings that include the completion of exercises and workshop activities. After a specific time allotted for the activity/workshop the instructor will then discuss the activity as part of the program. The change requested would also support the WSBA's strategic objective to ensure WA attorneys are equipped with 21st century skills. Most educational research points to the fact that in order to transfer skills you must use practical training which includes exercises and workshop that simulate the use of the skills to be transferred.

Rationale for change to accreditation:

1. Interactive elements in online modules provide a means for active engagement with content and a practical way to gain experience without requiring continuous audio or video content.

2. Adult learning principles suggest the most effective way to learn incorporates learning with an individual's experience. Online modules that include self-study segments provide a way for the person learning to engage with the content in an individualized way incorporating one's experience into the learning.
3. Quizzing and knowledge checks provide a mechanism to check in on learning progress, provide feedback and resources for further learning, and a way to measure transfer of learning toward assessing the obtainment of competence on a subject area.
4. An optimal mechanism in the success of learning includes actively applying information in the moment of delivery. Immediately practicing and performing a task based on new knowledge enhances the transfer of learning. Further, computer-based learning is proving to be most effective when the diversity of possible distractions is taken into account. Studies in timing and delivery of information to law students suggest that attention to the presentation decreases after 4-5 minutes (when a laptop is present), at which time the facilitator must redirect the learner to a new task (Morse, 2011). When the audio and video is delivered via computer, these triggers of engagement take on the form of interactions, that depart from continuous streaming and making space for the learner to make a decision, solve a problem, or recall information.

WSBA CLE would suggest the usage of the same methodology for requesting MCLE credits as discussed in original request of 2012 which is outlined below:

Methodology for requesting MCLE credits for self-directed online modules:

1. A review group composed of active WSBA members who practice in the subject area covered by the online module will be established to review the online module content for accuracy and provide estimated completion times for interactive elements, quizzing, and self-study incorporated into an online module. The estimated completion times will be used to arrive at a reasonable time allocation to request MCLE credits for these portions of the module.
2. Any audio/video elements will be valued at actual run time.
3. The combination of audio/video run times and estimated self-directed study times will be compiled to arrive at a requested total MCLE credit value submitted on the A/V Form 1.

Respectfully Submitted,

Kevin Plachy
Education Programs Manager

References:

Morse, Kim Novak. "Redirecting Laptop Users' Attention: Lessons from the Field." Institute for Law Teaching & Learning Summer Conference, New York Law School, New York NY. June 2, 2011. Workshop Session.

Introduction to Parenting Plans Workshop and CLE
NLE170207SEA
WSBA Conference Center
1325 Fourth Avenue, Suite 600
Seattle, WA 98101

02/07/2017 and 02/21/2017

This seminar has been approved for 4.5 Law and Legal Procedure CLE credits (.5 credit associated to an assignment – accredited for day two)

Description: In this hands on two-part workshop and CLE, you will learn how to draft a Parenting Plan, how to write a persuasive client declaration, and how to devise strategies for defending your client from potentially damaging information that can come up during contested family law hearings. In addition to the 4 MCLE credits you will earn from the seminar component of the program, you can also earn an additional 0.5 MCLE credits by independently completing a mock parenting plan assignment.

Co-Chairs or Committee:

Sarah Yohay Eaquinto, Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Abra Conitz, The Wheeler Firm, Seattle, WA

Amy Perlman, Connolly Tacon & Meserve, Olympia, WA

Day 1: February 7, 2017

8:00 a.m.

Check-in, Registration, Coffee and Pastry Service

8:25 a.m. Welcome and Introductions

Sarah Yohay Eaquinto - Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Abra Conitz - The Wheeler Firm, Seattle, WA

Start Time [8:30 a.m.]

Session 1: An Introduction to Drafting Parenting Plans [90 minutes]

In this introduction to parenting plans, participants will learn how to get the evidence and information they need to create a parenting plan, how to draft persuasive declarations and how to devise strategies for defending their clients from potentially damaging facts and claims. Instructors will reinforce each segment of the presentation with hypothetical exercises and in-class discussion.

Sarah Yohay Eaquinto - Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Abra Conitz - The Wheeler Firm, Seattle, WA

Start Time [10:00 a.m.]

Session 2: An Introduction to Drafting Parenting Plan Declarations [30 minutes]

Instructors will provide students with a mock client packet that will include materials that students will use to create a client declaration for their parenting plans. Instructors will brainstorm with students how they would approach the assignment and what additional information they might ask for if they had the opportunity to get the information from their clients. Students will preview the packet and look for potential issues that may come up while drafting a parenting plan declaration and brainstorm potential strategies for resolving those issues.

The session will conclude with a brief 10 minute question and answer session where students can ask specific questions about the drafting assignment as well as any questions they may have about any of the material the instructors have covered over the course of the CLE.

Sarah Yohay Eaquinto - Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Abra Conitz - The Wheeler Firm, Seattle, WA

Time Adjourn [10:30 a.m.]

Day 2: February 21, 2017

8:00 a.m.

Check-in, Registration, Coffee and Pastry Service

8:25 a.m. Welcome and Introductions

Sarah Yohay Eaquinto - Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Amy Perlman - Connolly Tacon & Meserve, Olympia, WA

Start Time [8:30 a.m.]

Session 1: The Parenting Plan Declaration Writing Assignment Review [30 minutes]

In this session, presenters Sarah Eaquinto and Amy Perlman will review the independent writing exercises that participants completed following the first class. Presenters will review a model answer and provide feedback to students based on trends they noticed. Presenters and students will brainstorm ways that they could improve their declarations to make them more persuasive in contested parenting plan hearings. This session will end with a brief question and answer session focusing on the assignment.

Sarah Yohay Eaquinto - Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Amy Perlman - Connolly Tacon & Meserve, Olympia, WA

Start Time [9:00 a.m.]

Session 2: Jurisdictional and Service Considerations for Parenting Plans [60 minutes]

Instructors will discuss jurisdiction and service considerations for parenting plans, including how attorneys can figure out where and when to file their materials and how child support issues can impact both jurisdiction and service.

Sarah Yohay Eaquinto - Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Amy Perlman - Connolly Tacon & Meserve, Olympia, WA

Start Time [10:00 a.m.]

Session 3: Introduction to Child Support [30 minutes]

Instructors will differentiate between administrative and judicial orders and discuss complications that can arise in parenting plans while considering child support requirements. This session will end with a 10 minute question and answer session where students will be able to ask any follow up questions that they have about any of the topics the instructors covered over the course of the two-day program.

Sarah Yohay Eaquinto - Staff Attorney & Volunteer Support Coordinator, Tacoma -Pierce County Bar Association Volunteer Legal Services Program, Tacoma, WA

Amy Perlman - Connolly Tacon & Meserve, Olympia, WA

Time Adjourn [10:30 a.m.]

WSBA Practice Primer: Estate Planning
Track Two – Trusts and Taxes
WSBA Conference Center
1325 4th Avenue, Suite 600, Seattle, WA 98101
Wednesday, October 11th – NLE181011SEA/WEB
Wednesday, October 18th – NLE181018SEA/WEB
Wednesday, October 25th – NLE181025SEA/WEB

This seminar has been approved for 6.0 CLE credits, including 5.75 Law and Legal Procedure and 0.25 Ethics. Optional homework will be assigned between sessions, there will be two assignments worth 0.5 credits (other) each, for a total of 1.0 credits (other) available for the entire track.

Description:

The Washington State Bar Association is pleased to offer our new Practice Primer seminars! The WSBA Practice Primer takes a substantive area of law and develops a series of learning tracks that build upon one another. Completion of all three learning tracks (usually three sessions within a track) will provide attendees with a solid educational foundation and primer for practice. The skills learned in this series would be beneficial to both new attorneys and experienced attorneys intending to change or expand practice areas. Our 2017 series will cover the practice area of Estate Planning. The topics covered by the three Practice Primer tracks include Wills, POAs and Health Directives, Trusts and Estates, and Probate and TEDRA.

The courses will be led by active practitioners offering both the experienced perspective and the new practitioner perspective, with guest faculty invited in to speak as subject matter experts. An extensive fact pattern has been devised to reach across all tracks and allow an immersive educational experience. We are very excited about this new offering and look forward to you joining us this fall!

Track Two - Trusts and Taxes

Session One - 10/11/17 - Revocable Trusts

Session Two - 10/18/17 - Estate and Trust Taxes

Session Three - 10/25/17 - Other Trust and Tax Issues

Co-Chairs:

Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle

Nicholas Pleasants – James Pleasants PC, Bellevue

Wednesday, October 11th, 2017

Session One – Revocable Trusts

8:30 a.m.

Check-in • Walk-in Registration • Coffee and Pastry Service

9:00 a.m.

Welcome and Introductions by Program Co-Chairs
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

9:05 a.m.

Revocable Trusts

120 minutes, 2 credits (2.0 L&L)

In this session we will begin with the basics of revocable trusts, covering: when a revocable trust is needed, signing requirements, pros and cons of a revocable trust, pourover wills, funding a revocable trust, trust administration, essential drafting techniques, and testamentary trusts.

Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue
Carla Wigen – Wells Fargo, Seattle

10:05 a.m. BREAK (10 minutes)

10:15 a.m.

Revocable Trusts (cont.)
Assign optional homework.

11:15 a.m.

Complete online evaluations • Adjourn

Wednesday, October 18th, 2017

Session Two – Estate and Trust Taxes

8:30 a.m.

Check-in • Walk-in Registration • Coffee and Pastry Service

9:00 a.m.

Welcome and Introductions by Program Co-Chairs
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

9:05 a.m.

Estate and Trust Taxes

120 minutes, 2 credits (1.75 L&L and 0.25 Ethics)

We will take a look at the tax implications for trusts in this session where we will cover: the Washington state and federal estate and gift tax regime, credit shelters, marital trusts, and related ethics questions. Review homework assignment.

Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

10:05 a.m. BREAK (10 minutes)

10:15 a.m.
Estate and Trust Taxes (cont.)
Assign optional homework.

11:15 a.m.
Complete online evaluations • Adjourn

Wednesday, October 25th, 2017
Session Three – Other Trust and Tax Issues

8:30 a.m.
Check-in • Walk-in Registration • Coffee and Pastry Service

9:00 a.m.
Welcome and Introductions by Program Co-Chairs
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

9:05 a.m.
Trust and Tax Issues
120 minutes, 2 credits (2.0 L&L)
This session will dig deeper on how to plan for and address other trust and tax issues, including: income taxation of trusts, retirement assets, other trust options (ILIT, GRAT, QPRT, QSST/ESBT, Crummey/gifting trusts, charitable trusts, etc), and LLCs and small family businesses. Review homework assignment.
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue
Ryan Bray – Bader Martin, Seattle

10:05 a.m. BREAK (10 minutes)

10:15 a.m.
Trust and Tax Issues (cont.)

11:15 a.m.
Complete online evaluations • Adjourn

WSBA Practice Primer: Estate Planning
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Description:

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The courses will be led by active practitioners offering both the experienced perspective and the new practitioner perspective, with guest faculty invited in to speak as subject matter experts. An extensive fact pattern has been devised to reach across all tracks and allow an immersive educational experience. We are very excited about this new offering and look forward to you joining us this fall!

Track Two - Trusts and Taxes

Session One - 10/11/17 - Revocable Trusts

Session Two - 10/18/17 - Estate and Trust Taxes

Session Three - 10/25/17 - Other Trust and Tax Issues

Co-Chairs:

Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle

Nicholas Pleasants – James Pleasants PC, Bellevue

Wednesday, October 11th, 2017

Session One – Revocable Trusts

8:30 a.m.

Check-in • Walk-in Registration • Coffee and Pastry Service

9:00 a.m.

Welcome and Introductions by Program Co-Chairs
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

9:05 a.m.

Revocable Trusts

120 minutes, 2 credits (2.0 L&L)

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Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue
Carla Wigen – Wells Fargo, Seattle

10:05 a.m. BREAK (10 minutes)

10:15 a.m.

Revocable Trusts (cont.)

11:15 a.m.

Complete online evaluations • Adjourn

Wednesday, October 18th, 2017

Session Two – Estate and Trust Taxes

8:30 a.m.

Check-in • Walk-in Registration • Coffee and Pastry Service

9:00 a.m.

Welcome and Introductions by Program Co-Chairs
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

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Estate and Trust Taxes

120 minutes, 2 credits (1.75 L&L and 0.25 Ethics)

We will take a look at the tax implications for trusts in this session where we will cover: the Washington state and federal estate and gift tax regime, credit shelters, marital trusts, and related ethics questions.

Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

10:05 a.m. BREAK (10 minutes)

10:15 a.m.
Estate and Trust Taxes (cont.)

11:15 a.m.
Complete online evaluations • Adjourn

Wednesday, October 25th, 2017
Session Three – Other Trust and Tax Issues

8:30 a.m.
Check-in • Walk-in Registration • Coffee and Pastry Service

9:00 a.m.
Welcome and Introductions by Program Co-Chairs
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue

9:05 a.m.
Trust and Tax Issues
120 minutes, 2 credits (2.0 L&L)
This session will dig deeper on how to plan for and address other trust and tax issues, including: income taxation of trusts, retirement assets, other trust options (ILIT, GRAT, QPRT, QSST/ESBT, Crummey/gifting trusts, charitable trusts, etc), and LLCs and small family businesses.
Johanna M. Coolbaugh – Karr Tuttle Campbell, Seattle
Nicholas Pleasants – James Pleasants PC, Bellevue
Ryan Bray – Bader Martin, Seattle

10:05 a.m. BREAK (10 minutes)

10:15 a.m.
Trust and Tax Issues (cont.)

11:15 a.m.
Complete online evaluations • Adjourn

WSBA Practice Primer: Employment Law

Track 1 – Starting the Employment Relationship: Setting Yourself up for Success



1

Session 1: April 9, 2019
Session 2: April 16, 2019
Session 3: April 23, 2019

Approved for 7.0 CLE Credits: 5.5 Law and Legal Procedure + .5 Ethics.
 Optional homework between sessions worth .5 Other for a **total of 1.0 Other.**

TUITION:

\$275 - Standard
 \$600 - Member Discount for all three tracks (21 CLE credits) Save \$225.
 \$79 - New Member*

*Members who have been admitted to practice in Washington for fewer than five years

Washington State Bar Association
 Conference Center
 1325 Fourth Ave, Suite 600
 Seattle, WA 98101

Live WEBCAST Option

DESCRIPTION:

The Washington State Bar Association is pleased to offer the 2019 Practice Primer seminar! The WSBA Practice Primer examines a substantive area of law through a series of learning tracks that build upon one another. Completion of all three learning tracks (consisting of three sessions within each track) will provide attendees with a solid educational foundation and primer for practice. The skills learned in this series would benefit new attorneys and experienced attorneys intending to change or expand practice areas.

Our 2019 series is focused on Employment Law. The topics covered by the three Practice Primer tracks are: Starting the Employment Relationship: Setting Yourself up for Success, Managing the Employment Relationship and Ending the Employment Relationship.

The complete 2019 Practice Primer Series will occur over the course of three months, April through June, with sessions held on Wednesdays from 9:00 a.m. to 11:15 a.m. New Members who are licensed for less than five years in WA are eligible for the New Member Pricing of \$79.00 per track. Members who do not qualify for the New Member Pricing can benefit from a tuition discount by purchasing all three tracks for \$600.00 and earn a total of 21 CLE credits. Each course will be led by one active and one new practitioner, with guest faculty invited to speak as subject matter experts. The faculty have created a fact pattern to reach across all tracks for an immersive educational experience.

By participating in the full program, participants will have the opportunity to earn 1.0 Other CLE credits by independently completing two legal writing exercises (each accredited at 0.5 Other credit). Attendees who choose to complete the writing exercises may submit their work to the faculty for review but it is not required. Exercises are assigned during sessions one and two, and must be completed prior to the next class where the attendee certifies completion of the assignment on their sign-in form or via the webcast tool.

TRACK 1 – Starting the Employment Relationship: Setting Yourself up for Success

SESSION 1:

2 hours – Building Blocks of Hiring – April 9, 2019

SESSION 2:

2 hours – Screening and Onboarding – April 16, 2019

SESSION 3:

2 hours – Significant Considerations – April 23, 2019

FACULTY CO-CHAIRS:

Sarah E. Derry, Barnard Iglitzin & Lavitt LLP, Seattle
 Nicole M. Tedrow, Associated Industries, Spokane

SCHEDULE

TUESDAY, APRIL 9, 2019 – SESSION 1

8:30 a.m. Check-in • Walk-in Registration Morning Refreshments

9:00 a.m. Welcome and Introductions by Faculty Co-Chairs

9:05 a.m. Building Blocks of Hiring

Faculty will identify different types of employment relationships and discuss liability issues, identifying the client and associated ethical considerations and a roadmap for moving forward. Optional homework will be assigned.

Sarah E. Derry, Barnard Iglitzin & Lavitt LLP, Seattle
 Nicole M. Tedrow, Associated Industries, Spokane

10:05 a.m. BREAK (ten minutes)

10:15 a.m. Building Blocks of Hiring (continued)

11:15 a.m. Adjourn

TUESDAY, APRIL 16, 2019 – SESSION 2

8:30 a.m. Check-in • Walk-in Registration Morning Refreshments

9:00 a.m. Welcome and Introductions by Faculty Co-Chairs

Sarah E. Derry, Barnard Iglitzin & Lavitt LLP, Seattle
 Nicole M. Tedrow, Associated Industries, Spokane

9:05 a.m. Screening and Onboarding

Faculty will outline best hiring practices, focusing on background screening requirements, I-9 considerations and employee handbooks, as well as collective bargaining agreements. Faculty will review the prior optional homework and assign the second optional assignment.

Sarah E. Derry, Barnard Iglitzin & Lavitt LLP, Seattle
 Nicole M. Tedrow, Associated Industries, Spokane

10:05 a.m. BREAK (ten minutes)

10:15 a.m. Screening and Onboarding (continued)

11:15 a.m. Adjourn

(continued)

**WSBA NME190409 • April 9, 16, 23, 2019 • WSBA Practice Primer: Employment Law
Track 1 – Starting the Employment Relationship: Setting Yourself up for Success**

TUESDAY, APRIL 23, 2019 – SESSION 3

**8:30 a.m. Check-in • Walk-in Registration
Morning Refreshments**

**9:00 a.m. Welcome and Introductions by
Faculty Co-Chairs**

Sarah E. Derry, Barnard Iglitzin & Lavitt LLP, Seattle

Nicole M. Tedrow, Associated Industries, Spokane

9:05 a.m. Significant Considerations

Faculty will outline the basics of wage and hour exemptions as well as identify common labor law issues during the hiring process. Faculty will review the prior optional homework.

Sarah E. Derry, Barnard Iglitzin & Lavitt LLP, Seattle

Nicole M. Tedrow, Associated Industries, Spokane

10:05 a.m. BREAK (ten minutes)

10:15 a.m. Significant Considerations (continued)

11:15 a.m. Complete online evaluations • Adjourn

REGISTRATION

Please fill out the registration form and mail or fax to WSBA.
To register online, go to www.wsba.org/seminars and enter **NME190409** in the search box.

First Name _____ M.I. _____ Last Name _____
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If special accommodations are needed, please email cle@wsba.org or call toll-free at 1-800-945-9722.

PAYMENT INFORMATION

Please note: Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions. There is no transaction fee if you mail in your check.

- | | |
|--|--|
| <input type="checkbox"/> #NME190409SEA, attend in Seattle, 4/9/19 - 4/16/19 - 4/23/19 | <input type="checkbox"/> #NME190409WEB, attend via webcast, 4/9/19 - 4/16/19 - 4/23/19 |
| <input type="checkbox"/> \$275 - Standard | <input type="checkbox"/> \$275 - Standard |
| <input type="checkbox"/> \$600 - All three tracks (21 CLE credits) Save \$225 (NME190507SEA and NME190604SEA) | <input type="checkbox"/> \$600 - All three tracks (21 CLE credits) Save \$225 (NME190507WEB and NME190604WEB) |
| <input type="checkbox"/> \$79 - New Member* | <input type="checkbox"/> \$79 - New Member* |

*Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition.

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Mail: WSBA, 1325 Fourth Avenue, Suite 600, Seattle, WA 98101-2539

Internet: Register online at www.wsba.org/seminars • Order products online at www.mywsba.org.

Phone: 800-945-9722 or 206-443-9722 with credit card and registration/order form in hand.

Fax: 206-727-8324 Include credit card information

PAYMENT POLICIES

PAYMENT: Individual registrants must use a separate form, however, payment may be made with a single check or credit card for multiple parties.

NOTE: Please keep a copy of this flier for your records.

REFUNDS: Registration fees may be refunded, less \$25 for handling, for written cancellations postmarked, emailed, or faxed by 5 p.m., up to 3 business days before the seminar. No refunds after that date, but you will receive the coursebook. Canceled registrations may not be transferred to other seminars. You may send a substitute (e.g., someone from your firm) in lieu of canceling.

Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site.

office use only Date _____ Check # _____ Total _____

TRACK 1: Criminal Law and Procedure: The Good The Bad, and The Complex



Session 1: February 5, 2020
Session 2: February 12, 2020
Session 3: February 19, 2020

Approved for 7.0 CLE Credits: 5.5 Law and Legal Procedure + .5 Ethics.
 Optional homework between sessions worth .5 Other for a **total of 1.0 Other.**

TUITION:

\$275 - Standard
 \$79 - New Member*
 \$600 - Member Discount for all three tracks (21 CLE credits) Save \$225.

*Members who have been admitted to practice in Washington for fewer than five years

Washington State Bar Association
 Conference Center
 1325 Fourth Ave, Suite 600
 Seattle, WA 98101

Live WEBCAST Option

DESCRIPTION:

The Washington State Bar Association is pleased to offer the 2020 Practice Primer seminar. The WSBA Practice Primer examines a substantive area of law through a series of learning tracks that build upon one another. Completion of all three learning tracks (consisting of three sessions within each track) will provide attendees with a solid educational foundation and primer for practice. The skills learned in this series would benefit new attorneys and experienced attorneys intending to change or expand practice areas.

Our 2020 series is focused on Criminal Law. The topics covered by the three Practice Primer tracks are: Criminal Law and Procedure: The Good, The Bad, and The Complex; Confrontation, Resolution and (Almost) Everything in Between; and Introduction to Felonies.

The complete 2020 Practice Primer Series will occur over the course of three months, February through April, with sessions held on Wednesdays from 9:00 a.m. to 11:15 a.m. New Members who are licensed for less than five years in WA are eligible for the New Member Pricing of \$79.00 per track. Members who do not qualify for the New Member Pricing can benefit from a tuition discount by purchasing all three tracks for \$600.00 and earn a total of 21 CLE credits. Each course will be led by one active and one new practitioner, with guest faculty invited to speak as subject matter experts. The faculty have created a fact pattern to reach across all tracks for an immersive educational experience.

By participating in the full program, participants will have the opportunity to earn 1.0 Other CLE credits by independently completing two legal writing exercises (each accredited at 0.5 Other credit). Attendees who choose to complete the writing exercises may submit their work to the faculty for review but it is not required. Exercises are assigned during sessions one and two, and must be completed prior to the next class when the attendee certifies completion of the assignment on their sign-in form or via the web-cast tool.

**TRACK 1 – Criminal Law and Procedure:
 The Good, The Bad and The Complex**

SESSION 1: Rules of Engagement

2 hours – February 5, 2020

SESSION 2: Building a Defense

2 hours – February 12, 2020

SESSION 3: Collateral Consequences and Defense Basics

2 hours – February 19, 2020

FACULTY CO-CHAIRS:

Dua M. Abudiab – King County Department of Public Defense, Seattle

Philip A. Chinn – King County Department of Public Defense, Seattle

SCHEDULE**WEDNESDAY, FEBRUARY 5, 2020 – SESSION 1**

8:30 a.m. Check-in • Walk-in Registration
 Morning Refreshments

9:00 a.m. Welcome and Introductions

Devorah Signer Hill – Washington State Bar Association, Seattle

9:05 a.m. Rules of Engagement

Faculty will discuss how a criminal defense attorney would initially approach and build a case, including discovery considerations, confidentiality, client communication, and the initial client visit. Faculty will assign optional homework.

Dua M. Abudiab – King County Department of Public Defense, Seattle

Philip A. Chinn – King County Department of Public Defense, Seattle

10:05 a.m. BREAK (10 minutes)**10:15 a.m. Rules of Engagement (continued)**

11:15 a.m. Adjourn

WEDNESDAY, FEBRUARY 12, 2020 – SESSION 2

8:30 a.m. Check-in • Walk-in Registration
 Morning Refreshments

9:00 a.m. Welcome and Introductions

Devorah Signer Hill – Washington State Bar Association, Seattle

9:05 a.m. Building a Defense

This session will examine the defense attorney's primary considerations at this stage of a criminal case, including CRR 3.2, local rules and court cultures, reading and managing discovery documents, and investigations. Faculty will assign optional homework.

Dua M. Abudiab – King County Department of Public Defense, Seattle

Philip A. Chinn – King County Department of Public Defense, Seattle

10:05 a.m. BREAK (10 minutes)**10:15 a.m. Building a Defense (continued)**

11:15 a.m. Adjourn

(continued)

**WSBA NME200205 • February 5, 12, 19, 2020 • PRACTICE PRIMER: CRIMINAL LAW
TRACK 1: Criminal Law and Procedure: The Good, The Bad and The Complex**

WEDNESDAY, FEBRUARY 19, 2020 – SESSION 3

8:30 a.m. Check-in • Walk-in Registration
Morning Refreshments

9:00 a.m. Welcome and Introductions

Devorah Signer Hill – Washington State Bar Association, Seattle

9:05 a.m. Collateral Consequences and Defense Basics

In this last session of Track One, faculty will provide an overview of collateral consequences of a criminal conviction, with special attention paid to the intersection with immigration law, as well as basic legal defenses. Faculty will touch upon considerations around raising a client's mental health or competency to the court.

Dua M. Abudiab – King County Department of Public Defense, Seattle

Philip A. Chinn – King County Department of Public Defense, Seattle

Jonathan Moore – Washington Defender Association's Immigration Project, Seattle, WA

10:05 a.m. BREAK (ten minutes)

10:15 a.m. Collateral Consequences and Defense Basics (continued)

11:15 a.m. Complete online evaluations • Adjourn

REGISTRATION

Please fill out the registration form and mail or fax to WSBA.
To register online, go to www.wsba.org/seminars and enter **NME200205** in the search box.

First Name _____ M.I. _____ Last Name _____

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If special accommodations are needed, please email cle@wsba.org or call toll-free at 1-800-945-9722.

PAYMENT INFORMATION

Please note: Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions. There is no transaction fee if you mail in your check.

**#NME200205SEA, attend in Seattle,
2/5/20 – 2/12/20 – 2/19/20**

\$275 – Standard

\$79 – New Member*

**\$600 – All three tracks (21 CLE credits) Save \$225
(NME200304SEA and NME200401SEA)**

**#NME200205WEB, attend via webcast,
2/5/20 – 2/12/20 – 2/19/20**

\$275 – Standard

\$79 – New Member*

**\$600 – All three tracks (21 CLE credits) Save \$225
(NME200304WEB and NME200401WEB)**

*Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition.

Check enclosed payable to WSBA

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Internet: Register online at www.wsba.org/seminars • Order products online at www.mywsba.org.

Phone: 800-945-9722 or 206-443-9722 with credit card and registration/order form in hand.

Fax: 206-727-8324 Include credit card information

PAYMENT POLICIES

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Registrations received less than 48 hours before a seminar are not guaranteed a coursebook or other presentation materials on-site.

office use only Date _____ Check # _____ Total _____

WSBA Practice Primer: Family Law Track 1 – The Amicable Divorce

WSBA CLE
NME210113 WEB



Session 1: January 13, 2021
Session 2: January 20, 2021
Session 3: January 27, 2021

Tuition:

\$275 – Standard
\$79 – New Member*
\$600 – All Tracks Discount

*Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition.

Up to 7.0 CLE credits[†]

L&LP – 5.25
Ethics – .25
Other – .50

[†]Optional homework will be assigned between sessions, worth .5 Other credit each, for a total of 1.0 Other credits available through the entire track.

Washington State Bar Association

Webcast Only

DESCRIPTION:

The Washington State Bar Association is pleased to offer the 2021 Practice Primer seminar. The WSBA Practice Primer examines a substantive area of law through a series of learning tracks that build upon one another. Completion of all three learning tracks (consisting of three sessions within each track) will provide attendees with a solid educational foundation and primer for practice. The skills learned in this series would benefit new attorneys and experienced attorneys intending to change or expand practice areas.

Our 2021 Practice Primer Family Law tracks are:

- (1) Track One: The Amicable Divorce.
- (2) Track Two: Dissolution Plus.
- (3) Track Three: The Messy Divorce.

The learning tracks will deliver in January, February and March 2021, respectively, with sessions on Wednesdays from 9:00 a.m. to 11:15 a.m.

New Members who are licensed for less than five years in WA are eligible for the New Member Pricing of \$79.00 per track. Members who do not qualify for the New Member Pricing can benefit from a tuition discount by purchasing all three tracks for \$600.00. Each course will be led by one active and one new practitioner. The faculty have created a fact pattern to reach across all tracks for an immersive educational experience.

During each track, participants have the opportunity to earn 1.0 Other CLE credits by independently completing two legal writing exercises (each accredited at 0.5 Other credit). Attendees who choose to complete the writing exercises may submit their work to the faculty for review but it is not required. Exercises are assigned during sessions one and two, and must be completed prior to the next class when the attendee certifies completion of the assignment at webcast log-in.

FACULTY CO-CHAIRS:

- Laura M. Groves – Law Offices of Laura M. Groves, PLLC, Tacoma
- Shayla McKee – Elise Buie Family Law Group, Seattle

Schedule

WEDNESDAY, JANUARY 13, 2021 – SESSION 1

8:30 a.m. Webcast lobby opens

9:00 a.m. Welcome and Introductions

Shanthi Raghu – Washington State Bar Association, Seattle

9:05 a.m. Foundations and Initial Concepts

This first session will frame the initial concepts for the introduction to a family law practice. Faculty will discuss the importance of mentorship, and then dig into the realities of taking a case. The discussion will touch upon conflicts checks, initial client forms, client consultations, fee structures and agreements and billing best practices. Faculty will also assign optional homework to review in the second session.

Laura M. Groves – Law Offices of Laura M. Groves, PLLC, Tacoma
Shayla McKee – Elise Buie Family Law Group, Seattle

10:05 a.m. BREAK (10 minutes)

10:15 a.m. Foundations and Initial Concepts (continued)

11:15 a.m. Adjourn

WEDNESDAY, JANUARY 20, 2021 – SESSION 2

8:30 a.m. Webcast lobby opens

9:00 a.m. Welcome and Introductions

Shanthi Raghu – Washington State Bar Association, Seattle

9:05 a.m. The Dissolution

In this second session, faculty will examine the dissolution process itself, starting with building an effective client file through useful intake forms and proper financial documents. Presenters will also review the mandatory forms, and discuss timing considerations for filing the case. Faculty will assign optional homework.

Laura M. Groves – Law Offices of Laura M. Groves, PLLC, Tacoma
Shayla McKee – Elise Buie Family Law Group, Seattle

10:05 a.m. BREAK (10 minutes)

10:15 a.m. The Dissolution (continued)

11:15 a.m. Adjourn

(schedule continued next page)

WSBA Practice Primer: Family Law • Track 1 – The Amicable Divorce
January 13, 20, 27, 2021 • NME210113 WEB

(schedule continued from previous page)

WEDNESDAY, JANUARY 27, 2021 – SESSION 3

8:30 a.m. Webcast lobby opens

9:00 a.m. Welcome and Introductions

Shanthi Raghu – Washington State Bar Association, Seattle

9:05 a.m. Post-Dissolution: How to Finalize the Case

During this last session, faculty will outline primary considerations when finalizing a client's case, including parenting plans, child support enforcement and Qualified Domestic Relations Orders. The session will also examine separation contracts, CR2a agreements and the default process, and how to properly end the attorney-client relationship.

The faculty will close the track by discussing the importance of avoiding burnout while practicing in this area of law, self-care and how to set appropriate client boundaries.

Laura M. Groves – Law Offices of Laura M. Groves, PLLC, Tacoma
Shayla McKee – Elise Buie Family Law Group, Seattle

10:05 a.m. BREAK (10 minutes)

10:15 a.m. Post-Dissolution: How to Finalize the Case (continued)

11:15 a.m. Complete online evaluations • Adjourn

REGISTRATION

Please fill out the registration form and mail or fax to WSBA seven business days prior to the program. To register online, go to www.wsba.org/seminars and enter **NME210113** in the search box. **Do not return form with financial information via email.**

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PAYMENT INFORMATION

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#NME210113WEB, attend via webcast,
1/13/2021 – 1/20/2021 – 1/27/2021

\$275 - Standard

\$79 - New Member*

*Members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition.

#NME210113WEB, attend via webcast,
1/13/2021 – 1/20/2021 – 1/27/2021

#NME210210WEB, attend via webcast,
2/10/2021 – 2/17/2021 – 2/24/2021

#NME210317WEB, attend via webcast,
3/17/2021 – 3/24/2021 – 3/31/2021

\$600 - All Tracks Discount

Check enclosed payable to WSBA

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Mail: Washington State Bar Association, 1325 Fourth Ave, Suite 600,
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REFUNDS: Registration fees may be refunded, less \$25 for handling, for written cancellations postmarked, emailed, or faxed by 5 p.m., up to 3 business days before the seminar. No refunds after that date, but you will receive the coursebook. Canceled registrations may not be transferred to other seminars. You may send a substitute (e.g., someone from your firm) in lieu of canceling.

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office use only Date _____ Check # _____ Total _____

WSBA Practice Primer: Estate Planning Track One—Wills, POAs, and Health Directives

**WSBA CLE
NME231000 WEB**



Wednesday, October 12, 2022
Wednesday, October 19, 2022
Wednesday, October 26, 2022

6.00 CLE credits

L&LP - 4.50
Ethics - 1.50

Tuition:

\$275 - Standard
\$79 - New Members*

*New Members who are licensed for less than five years in WA are eligible for the New Member Pricing of \$79.00 per track.

Washington State Bar Association

Webcast

DESCRIPTION:

The WSBA Practice Primer takes a substantive area of law and develops a series of learning tracks that build upon one another. Completion of all three learning tracks (usually three sessions within a track) will provide attendees with a solid educational foundation and primer for practice. The skills learned in this series would be beneficial to both new attorneys and experienced attorneys intending to change or expand practice areas. Our 2022 series will cover the practice area of Estate Planning.

The topics covered by the three Practice Primer tracks include:

1. Wills, POAs and Health Directives
2. Trusts, Gifting & Asset Transfers and Ethics
3. Probate and TEDRA

The courses will be led by active practitioners offering both the experienced perspective and the new practitioner perspective, with guest faculty invited in to speak as subject matter experts.

Schedule

WEDNESDAY, OCTOBER 12, 2022 – SESSION 1

Client Interview/Counseling, Surrogate Decision Making, and the Basics of Wills and Probate

8:30 a.m. Webcast Lobby Opens

9:00 a.m. Welcome and Introductions

Rachel Matz – Washington State Bar Association, Seattle

9:05 a.m. Back to Basics: The Client Interview, Exploring Options, and Basic Wills

In this session we will begin with the basics of estate planning covering a variety of topics: interviewing, the standard for signing wills and other documents, surrogate decision making, alternatives to wills, the anatomy of a basic will, how to choose a personal representative, and the types of bequests and beneficiary designations afforded by basic wills. During the final 30 minutes of the session, we will cover basic ethics in estate planning including the continuum of capacity (RPC 1.14).
Stella Edens Pederson – Gravis Law, PLLC, Richland
Gregory Sklar – Farr Law Group, PLLC, Enumclaw

10:05 a.m. BREAK (10 minutes)

10:15 a.m. Back to Basics: The Client Interview, Exploring Options, and Basic Wills (cont.)

11:15 a.m. Complete online evaluations • Adjourn



WEDNESDAY, OCTOBER 19, 2022 – SESSION 2

Advanced Planning Issues

8:30 a.m. Webcast Lobby Opens

9:00 a.m. Welcome and Introductions

Rachel Matz – Washington State Bar Association, Seattle

9:05 a.m. A Deeper Look: Advanced Planning Issues and Community Property Basics

We will take a more in depth look in this session where we will cover: specific terms and their implications, community property basics, non-probate assets, burial instructions, digital assets, CIRs (Committed Intimate Relationships) and testamentary trust basics. We will wrap up this session with a discussion of ethical issues that arise in regard to co-personal representatives and beneficiaries.
Beth McDaniel – Law Offices of Beth A McDaniel, PLLC, Renton
Dalynne Singleton – Gourley Law Group, Snohomish

10:05 a.m. BREAK (10 minutes)

10:15 a.m. A Deeper Look: Advanced Planning Issues and Community Property Basics (cont.)

11:15 a.m. Complete online evaluations • Adjourn



(schedule continued next page)

(schedule continued from previous page)

WEDNESDAY, OCTOBER 26, 2022 – SESSION 3

POA Health Care Directives

8:30 a.m. Webcast Lobby Opens

9:00 a.m. Welcome and Introductions

Rachel Matz – Washington State Bar Association, Seattle

9:05 a.m. Healthcare Helpers: Surrogate Decision Making, Power of Attorney, and Health Care Directives

This session will dig deeper on how to plan for and direct future assistance, we will cover: surrogate decision making, powers of attorney, health care directives and death with dignity, POLST, how advanced directives work together, and putting it all together. During the final 45 minutes of the session, we will cover relevant ethics issues, including the continuum of capacity and elder abuse.

Megan Farr – Farr Law Group, PLLC, Enumclaw

Stella Edens Pederson – Gravis Law, PLLC, Richland

10:05 a.m. BREAK (10 minutes)

10:15 a.m. Healthcare Helpers: Surrogate Decision Making, Power of Attorney, and Health Care Directives (cont.)

11:15 a.m. Complete online evaluations • Adjourn

|||||
(Registration and payment on next page)

REGISTRATION

Please fill out the registration form and mail to WSBA seven business days prior to the program. To register online, go to www.wsba.org and enter **NME231000** in the search box. **For your security, do not email or fax credit card information.**

First Name M.I. Last Name

WSBA No. Firm/Company Name

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City State Zip

Phone Email

If special accommodations are needed, please email cle@wsba.org or call toll-free at **1-800-945-9722**.

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PAYMENT INFORMATION

PLEASE NOTE: Our service provider will charge you a separate, non-refundable transaction fee of 2.5% on all bank card transactions. There is no transaction fee if you mail in your check.

#NME231000 WEB, attend via webcast
 10/12/2022 – 10/19/2022 – 10/26/2022

- \$275.00 – Standard
- \$79.00 – New Members*

*New Members who are licensed for less than five years in WA are eligible for the New Member Pricing of \$79.00 per track.

Check enclosed payable to WSBA

Visa MasterCard AmEx

▶
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INTERNET: Register online at www.wsba.org Order products online at www.mywsba.org.

PHONE: **800-945-9722** or **206-443-9722** with credit card and registration/order form in hand.

OFFICE USE ONLY Date Check # Total

PAYMENT POLICIES

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What is a Practice Primer?

The WSBA Practice Primer takes a substantive area of law and develops a series of learning tracks that build upon one another. Completion of each session in all three learning tracks will provide attendees with a solid educational foundation and primer for practice. While designed for new members, and offered at new member pricing*, the Practice Primer can be of interest to those looking to transition into additional practice areas.



Development Team Structure

The Development Team is an important and crucial team that creates a high quality Practice Primer. The purpose of the team is to serve as chairs, content developers, and faculty for each track, as well as filling the roles of an online moderator and project leader for a track. The Practice Primer Development Team is made up of six volunteers.

- Three Subject Matter Expert Chairs: Seasoned/experienced in the practice area, skilled at presenting, collaborating, and incorporating feedback and committed to fostering, developing, and supporting new members coming into the profession.
- Three New Member Chairs: New attorneys with less than 5 years of practice experience and limited exposure to Business Law. The new member role is to bring their experience as a new practitioner and identify and advocate for new members educational needs.

Four Phases

The Development Team is split into three groups of two volunteer chairs and works in four phases:

Phase 1 – Curriculum Development

- Define how to structure the substantive area into Foundations, Intermediate, and Advanced tracks
- Identify objectives for all sessions within the three tracks
- Identify the format, activities, and approach to strengthen/reinforce a transfer of knowledge

Phase 2 – Foundations Development and Day of Delivery

- Two volunteers chairs will develop and deliver the sessions within the track, (usually three to four sessions) each two hours
- Entire Development Team will provide feedback on the Foundations Track

Phase 3 – Intermediate Development and Delivery

- Two volunteers chairs will develop and deliver the sessions within the track, (usually three to four sessions) each two hours
- Entire Development Team will provide feedback on the Intermediate Track

Phase 4 – Advance Development and Delivery

- Two volunteers chairs will develop and deliver the sessions within the track, (usually three to four sessions) each two hours
- Entire Development Team will provide feedback on the Advance Track

Volunteer Position Description

The New Member Chair, the Subject Matter Expert Chair and the WSBA Education Programs Lead will team-up to design either the basic, intermediate, or advanced learning track curriculum.

Responsibilities Include

- Design curriculum in the basic, intermediate, or advanced learning track
- Develop course materials
- Recruit supplemental faculty
- Co-teach courses and deliver a dynamic presentation

Time Commitment - Length of volunteer commitment is approximately five months. Time commitment is front loaded in the first month and will vary on the needs of each seminar. The specific dates are:

- Orientation Meeting: TBD – 1 hr – at the WSBA Conference Center
- Program Development: In these two, three-hour meetings, the full Development Team will design the complete curriculum for Business Law learning track.
 - TBD at the WSBA Conference Center
 - TBD at the WSBA Conference Center
- Seminar Development: based on the co-chairs' schedule and need to get task and duties accomplished.
- Attend all sessions within the track assigned for development (preferably in person).

Preferred Qualifications and Skills - Qualifications and skills include but not limited to:

- Substantive area expertise (for the Subject Matter Expert Chair)
- Collaboration and team work
- Curriculum development
- Presentation and public speaking skills
- Past volunteer experience
- Problem-solving ability
- Dependability

Benefits/Support

- Receive complimentary seminar registration to the entire learning track.
- Network and build professional relationships with subject matter experts in Business Law.
- New Member Chair will bring the perspective of the new lawyer community and contribute to the development of a seminar with high value to new members.
- Subject Matter Expert Chair will contribute their knowledge and expertise to a foundational program that will assist future practitioners in entering the substantive practice area.

*New Member Pricing – members who have been admitted to practice in Washington for fewer than five years are eligible to receive the new member tuition

To sign up and volunteer contact Megan Scott at megans@wsba.org or at 206.733.5984



WSBA
REGULATORY SERVICES DEPARTMENT

MCLE

phone: 206-733-5987
e-mail: mcle@wsba.org

October 10, 2016

Kevin Plachy
WSBA CLE
1325 4th Ave, Suite 600
Seattle, WA 98101

RE: Request for MCLE Accreditation of Self-Directed Online Training Modules

Dear Kevin:

Thank you for coming to the October 7, 2016 MCLE Board meeting to explain how WSBA CLE interactive online learning modules are going to be developed. The Board sees a lot of value in the use of practical training as a way to transfer legal knowledge and skills. Therefore, the Board has decided to reaffirm its 2012 decision to accredit self-directed online training modules in accordance with the previously agreed upon methodology.

Please notify us as soon as the first online module is available as at least of the Board members would like to audit it and offer feedback.

Sincerely,

A handwritten signature in cursive script, appearing to read "Renata de Carvalho Garcia".

Renata de Carvalho Garcia
MCLE Manager

Sent via email

Working Together to Champion Justice

Washington State Bar Association • 1325 Fourth Avenue, Suite 600 / Seattle, WA 98101-2539 • 206-733-5987 / www.wsba.org

| |
|---|
| DISCUSSION: WSBA Task Force Administering Xenial Involvement with Court Appointed Boards |
|---|

Summary: MCLE Board Chair, Todd Alberstone, currently serves as the MCLE Board representative on the WSBA Task Force Administering Xenial Involvement with Court Appointed Boards (TAXICAB). TAXICAB has drafted a Joint Administration Policy Between the Washington State Bar Association and the Supreme Court Boards. The TAXICAB has requested for this policy to be presented to each Supreme Court Board represented on the Task Force for review and to consider endorsing the policy prior to TAXICAB bringing it to the Board of Governors and ultimately the Supreme Court.

Background:

The Task Force charter lists the team's responsibilities as:

1. Assessing the WSBA's collaborative role in administering Court appointed Boards, to include current and future boards appointed or established by the Court. Currently, these Boards include the Access to Justice Board, Disciplinary Board, Limited License Legal Technician Board, Limited Practice Board, Mandatory Continuing Legal Education Board and the Practice of Law Board (Court Appointed Boards).
2. Working with the Court to ensure that WSBA's administration of current Court Appointed Boards is consistent with the Court's intent and to share information that will enable the Court Appointed Boards to better serve their missions. This includes providing information regarding the fiscal impact of the Court Appointed Board and substantive measures that could be taken to improve and better facilitate the Boards.
3. Conveying to the court substantive information about the Boards and member concerns.

Discussion:

- Should the MCLE Board endorse the policy agreement drafted by the TAXICAB team?

Attachments:

- WSBA TAXICAB draft policy.V3.CLEAN.November 11 2022
- WSBA TAXICAB draft policy.V3.November 11 2022
- TAXICAB Charter

Charter

WSBA
Board of Governors

*Approved by the WSBA Board of Governors April 17, 2020
Revised by the WSBA Board of Governors November 13, 2020*

Purpose

TASK FORCE TEAM TO BEGIN COLLABORATIVE DISCUSSION WITH COURT REGARDING DELEGATED ADMINISTRATED ENTITIES ON ISSUES BOTH SUBSTANTIVE, FISCAL, AND ADMINISTRATIVE DUE TO THE CONTINUAL CONFLICTS RESULTING

Overall Role and Responsibility

The Washington State Bar Association (WSBA) Board of Governors recognizes the need for a task force to be able to work with the Washington Supreme Court to coordinate efforts to administer Court Boards and facilitate cooperation and the sharing of information between the Court and the WSBA on issues related to substantive, fiscal and administrative concerns.

The Task Force Team Administering Xenial Involvement with Court Appointed Boards will be comprised of the President, President-Elect, Immediate Past President and four sitting Governors from the WSBA; one representative of each of the Court Appointed Boards identified below in paragraph 1; and one WSBA staff liaison to advise and counsel the Task Force.

The Task Force responsibilities will include:

1. Assessing the WSBA's collaborative role in administering Court appointed Boards, to include current and future boards appointed or established by the Court. Currently, these Boards include the Access to Justice Board, Disciplinary Board, Limited License Legal Technician Board, Limited Practice Board, Mandatory Continuing Legal Education Board and the Practice of Law Board (Court Appointed Boards).
2. Working with the Court and the Court Appointed Boards to ensure that WSBA's administration of current Court Appointed Boards is consistent with the Court's intent and to share information that will enable the Court Appointed Boards to better serve their missions. This includes providing information regarding the fiscal impact of the Court Appointed Board and substantive measures that could be taken to improve and better facilitate the Boards.
3. Conveying to the court substantive information about the Boards and member concerns.

Action Taken by the Task Force

Action of the Task Force shall be made by majority/consensus decision of the Task Force.

Joint Administration Policy Between the Washington State Bar Association and the Supreme Court Boards

1.0 Introduction

Under Washington State Court [General Rule 12.3](#), the Supreme Court (Court) delegates to the Washington State Bar Association (WSBA),

“[t]he authority and responsibility to administer certain boards and committees established by court rule or order. This delegation of authority includes providing and managing staff, overseeing the boards and committees to monitor their compliance with the rules and orders that authorize and regulate them, paying expenses reasonably and necessarily incurred pursuant to a budget approved by the Board of Governors, performing other functions and taking other actions as provided in court rule or order or delegated by the Supreme Court, or taking other actions as are necessary and proper to enable the board or committee to carry out its duties or functions.”

Supreme Court Boards (Boards) report directly to the Court. The duties and functions these Boards perform on behalf of the Court are important to the public, the Court, and WSBA and its members.

2.0 Scope

This policy applies to all current and future Supreme Court Boards administered by WSBA, including:

- Access to Justice (ATJ) Board
- Disciplinary Board
- Limited License Legal Technician (LLLT) Board
- Limited Practice Board
- Mandatory Continuing Legal Education Board
- Practice of Law Board

3.0 Board Independence

Supreme Court Boards are created by and derive their authority from the Washington Supreme Court. Boards set their own priorities and goals. They determine how to carry out their duties and functions as authorized by the Supreme Court. Boards' independence does not limit WSBA's authority or responsibility to direct its own activities, including taking action to protect the WSBA from liability.

3.1 Effect of Court Rules and Statutes on Board or Committee Independence

Boards are subject to all Washington Statutes, and Washington court rules and orders, including such court orders or rules that authorized the Board, and which

regulate each Board's duties and functions. This specifically includes GR 12.4 governing records and public access to records.

3.2 Construing GR 12.3

WSBA recognizes that GR 12.3 provides each Board independence in terms of carrying out its activities consistent with any Court order or rule authorizing its existence. WSBA and the Boards will work cooperatively and maintain respect for the Boards' independence as needed to ensure that the Boards can carry out their duties and functions as authorized by the Supreme Court and that the WSBA can fulfill its duties under GR 12.3.

3.3 Communication with the Public

WSBA acknowledges that Boards have the authority to communicate with the public. Boards will not state that any communication is being made on behalf of WSBA. Boards will not use WSBA letterhead for any public communication. Boards will not knowingly engage in any communications that would subject the WSBA to liability. If there is a reasonable question as to the risk a communication might pose, Boards will seek input from the Executive Director prior to publishing or distributing the communication. The prohibition on using WSBA letterhead does not apply to communications related to regulatory matters.

3.4 Lobbying Activities

WSBA acknowledges that Boards, in order to carry out their mission, may take positions on matters of public interest. These positions may include communicating with federal, state, and local governmental and community leaders. Constitutional limitation on the use of compelled license fees apply to the Boards' activities to the extent that they are funded by license fees.

3.5 WSBA Policy Changes

All proposed changes to a WSBA policy, proposed adoptions of a new WSBA policy, or a WSBA proposal to change a Court rule, that will affect a Board, must be presented for a "first read" at least one meeting prior to the Board of Governors' meeting at which final action is taken. The Executive Director or their designee will notify the potentially affected Board(s) of the proposal as soon as is practicable after the Board of Governors' first consideration of the proposal and prior to final action, so each Board shall have the opportunity for comment with the Board of Governors, the Executive Director, and the Court. For good cause shown under exceptional circumstances, the Board of Governors may take action without the two-step process required above, by an affirmative vote of two-thirds of the Board of Governors, however WSBA should take all reasonable steps to notify and seek input from the impacted Board(s).

3.6 Board Action

When a Board is considering taking action that it believes may expose the WSBA to liability, the Board chair will take steps to ensure that the WSBA Executive Director receives notice of the proposed action. The notice will be given so that the WSBA will have adequate time to provide input into the Board's decision-making process.

4.0 Staffing

The Executive Director provides and manages staff for each Board.

4.1 Staff Liaison

The Executive Director shall assign a staff member to serve as a Staff Liaison to each Board. The Staff Liaison shall serve as the primary contact between the Board and WSBA. The Executive Director shall allocate additional staff time to support each Board in carrying out its duties and functions based on the projected workload for the Board and overall WSBA capacity.

4.2 Staff Liaison Responsibilities and Duties

The WSBA Staff Liaison will work with the Board and make available other WSBA resources as needed and available given WSBA's overall capacity.

The Staff Liaison is not a member of the Board. The Staff Liaison will not vote on matters before a Board that requires Board approval. The presence or absence of the Staff Liaison at any meeting does not affect the quorum for a meeting.

Although a Staff Liaison represents WSBA to the Board it is not the responsibility of the Staff Liaison to direct how the Board proceeds.

4.3 Staff Liaison and Support Personnel are WSBA Employees

Staff Liaisons supporting a Board are WSBA employees and will be hired and have their job performance evaluated per the WSBA Employee Handbook and other WSBA personnel policies.

When evaluating the performance of WSBA staff, the Executive Director, through their representative, should solicit feedback from each Board regarding the performance of the Staff Liaison and any supporting staff working with that Board.

The Board is not involved in the hiring of WSBA staff. However, with any employee whose primary or exclusive role is to support the duties and functions of a Board, WSBA should seek and may receive input from the Board as to skills and experience required for the role.

4.4 Board or Committee Membership

Each Board or Committee will add members to the Board and Committee per the Court rule or order that authorized and regulates the Board or Committee.

4.5 Board of Governors Liaison

The WSBA President may appoint a liaison between the Board of Governors and a Board.

The Board of Governor Liaison is not a member of the Board. They will not vote on matters before a Board that require Board approval. The presence or absence of the Board of Governors Liaison does not affect the quorum for a meeting.

4.6 Internal Structure of a Board

Unless otherwise defined by the court order or rule which authorizes and regulates a Board, the internal structure, such as the creation of subcommittees and appointment of members to such subcommittees, designating a chair or sub-chairs, and other decisions about how the Board conducts its duties and functions, is the sole province of each Board.

5.0 Oversight and Compliance Monitoring

Consistent with GR 12.3, WSBA shall oversee and monitor the compliance of Court Boards with the court rules and orders which authorize and regulate it. This includes GR 12.4 and First Amendment limitations relating to use of compelled license fees.

5.1 Reporting to the Court and WSBA

Boards shall submit an annual report to the Court and submit a copy of the report to the Executive Director and the Board of Governors. Boards shall submit other reports as stated in the court rules and orders authorizing them.

If the court rule or order which authorizes or regulates each Board is silent on the structure of an annual report the Board shall decide the format of the report.

5.2 Resolving Compliance Issues

5.2.1 Good Faith Standard—First Attempt to Resolve

If the Staff Liaison has a good faith belief that a Board is not complying with the court rules or orders which authorize and regulate the Board, the Staff Liaison shall first attempt to resolve the matter with the Board.

5.2.2 Escalation to Executive Director

If resolution fails and/or if the Staff Liaison is unable to address the matter directly, the Staff Liaison shall report any perceived non-compliance issue to the WSBA Executive Director who should attempt to work directly with the Board to resolve the issue.

5.2.3 Escalation to the Court

If these parties cannot resolve the matter, it may be presented to the Court for resolution.

6.0 Budget and Expenditures

6.1 Annual Budget Process

The Staff Liaison works collaboratively with the Board, and the Executive Director or their designee, to develop a budget that will allow the Board to fulfill its duties and functions, consistent with the rules and orders that authorize and regulate the Board.

The Board's budget will be submitted for approval to the Board of Governors as part of WSBA's overall budget.

WSBA and the Board of Governors cannot pass a budget for a Board without an opportunity for the Board to provide input to the WSBA and Board of Governors.

6.2 Funding Outside the Annual Budget Process

A Board may request additional funding outside of the budget cycle.

Such requests should be submitted to the Executive Director and will be considered by the Executive Director, the Budget & Audit Committee, or Board of Governors as authorized by WSBA Fiscal Policies & Procedures.

6.3 Fully Funding a Board Duties and Functions

All reasonable and necessary Board duties and functions as defined by each Board's court order or rule must remain funded at a level that ensures the duties and functions can be met. The Boards acknowledge that WSBA has the authority to establish the budget for the WSBA and the Boards. The WSBA acknowledges that this authority cannot be used to interfere with a Board's independence as defined in section 3.0.

6.4 Board Fundraising

A Board may seek additional funding, above and beyond the funding which WSBA provides, including grants for a particular duty or function from a government, private, or public sector entity.

If a Board raises such funds, then WSBA shall not reduce the budget of the Board because of the funds raised, unless it is for the same work.

As a Board is not a legal entity entitled to have and manage a bank account, the Board will need to seek the approval of WSBA, the Washington State Bar Foundation (WSBF), or with the approval of WSBA or the Court another appropriate entity to accept and manage such funds on behalf of the Board.

7.0 Other Actions

Consistent with GR 12.3, WSBA may engage in other activities that are necessary and proper to enable Boards to carry out their duties and functions consistent with the overall capacity of WSBA. This might include access to other WSBA resources and teams, including communication channels, design and publication services, website presence, financial analysis, WSBA technology, and continuing legal education.

8.0 Immunity & Indemnification

8.1 Immunity

If a court order or rule that authorizes and regulates a Board extends immunity to the Board and the members serving on a Board, WSBA shall cooperate with the Board and the Court to provide and defend such immunity.

8.2 Indemnification from Lawsuits

WSBA Bylaw Article XIV indemnification applies to members of court created boards described by this policy to the same extent as volunteers appointed by the WSBA.

DISCUSSION :
Suggested Amendment to APR 11

MCLE Board will review the report and recommendation for a suggested amendment to APR 11. MCLE Board will vote whether to move forward with suggested amendment and will vote on opening for public comment period.

Possible Discussion Topics:

- Discuss the report and recommendation
- Public comment period and next steps

Background:

At its xxx x, 2021 meeting, the MCLE Board discussed the potential

On X XX, XXXxX, the MCLE Board formed a workgroup to explore a suggested amendment to APR 11 that would require The workgroup is composed of three members from the MCLE Board (Todd Alberstone, Asia, Efrem).

On X, xxxx, the workgroup met to discuss potential language for a suggested amendment to APR 11. The workgroup decided to begin research and writing a report and recommendation and to prepare a draft.

Timeline:

| Possible Timeline for suggested amendment: | | |
|---|-----------------------------------|---|
| January 13, 2023 | MCLE Board Meeting | Workgroup presents report and recommendation to MCLE Board. MCLE Board will vote whether to move forward with suggested amendment. Reach out to stakeholders for initial feedback. |
| April 17, 2023 | MCLE Board Meeting | MCLE Board reviews report and recommendation and any feedback from stakeholders. Vote on opening for member and stakeholders comment period. |
| May 15, 2023 | | Close written comment period. |
| May 19, 2023 | MCLE Board Meeting | Public comment period during meeting. Hear member, public, and other stakeholder comments. Discuss feedback. MCLE Board to vote on whether to proceed with suggested amendment. If proceeding, MCLE Board to nominate Board members to present to WSBA BOARD OF GOVERNORS and work on presentation materials. |
| May 19, 2023 | Agenda items due | WSBA BOARD OF GOVERNORS agenda items due |
| June 5, 2023 | WSBA BOARD OF GOVERNORS Materials | WSBA BOARD OF GOVERNORS materials due. |

| | | |
|-------------------|--|---|
| June 23-24, 2023 | WSBA BOARD OF GOVERNORS Meeting | Present to WSBA BOARD OF GOVERNORS and ask for support. |
| August 4, 2023 | MCLE Board Meeting | Discuss feedback from WSBA BOARD OF GOVERNORS and vote on whether to move forward with suggested amendment. If proceeding, MCLE Board will nominate Board members to work on GR 9 coversheet. |
| August 11, 2023 | | First draft due of GR 9 coversheet. |
| August 28, 2023 | | Final draft due of GR 9 coversheet. |
| September 5, 2023 | WSBA BOARD OF GOVERNORS Meeting Materials deadline | If needed, send materials to or present at the WSBA BOARD OF GOVERNORS meeting September 22-23. |
| October 15, 2023 | Suggested Amendment Deadline | Send GR9 coversheet to Court by October 15 th . |

Enclosed Documents:

- **Draft of recommendation and report on the suggested amendment**

MEMORANDUM

TO: MCLE Board

FROM: Asia N. Wright

RE: CLE Audit Report

COURSE SPONSOR: America Immigration Lawyers Association (AILA)

COURSE TITLE: 2022 AILA Virtual Midwinter Conference: Advanced Business and Removal/Family – Navigating New Developments and Addressing Persistent Challenges

COURSE DATE(S): Recorded Webcast February 3-4, 2022

ACTIVITY ID#: 1194474

ACCREDITATION: Listed as 15 Law & Legal Credits; Recommendation to change to 14 Law & Legal and 1 Other – Office Management Credits.

DATE OF REPORT: September 5, 2022

Nature of the Program

The program consisted of various speakers discussing various topics.

Location/Time

Recorded Live Conference. The panelists could be seen in a video screen with their slides shown on a larger screen if the panelists used slides.

Facilities

Not applicable.

List of Presenters and Their Qualifications

See below for each session.

Written Materials

The written materials (referred to as a handbook) consisted of a 163-page pdf that included written articles by the presenters and practice pointers. The handbook is professionally put together and very likely to be used post-conference by the attendees.

Attendance

AILA provided codes in the chat feature for attendee to confirm attendance.

EXECUTIVE SUMMARY

This course meets the definition for 14 Law & Legal and 1 Other – Office Management Credits.

DISCUSSION

Hot Topics in Removal Practice (01:10:59) (1 Law and Legal Credit)

The four panelists (attorneys Jeremy McKinney, Amy Bittner, Greg Chen and Kate Melloy Goettel) spoke on the prominent issues in current removal practice. They discussed border conditions, new developments in removal proceedings and the use of prosecutorial discretion. All the of the panelists gave a lively, passionate discussion on moving forward the practice in this area of law. They also thoroughly discussed strategies on how to advance the practice as a whole. The panelists did not utilize slides.

Misrepresentation and Fraud in Crimmigration Issues (01:00:19) (1 Law and Legal Credit)

The four panelists (attorneys W. Michael Sharma-Crawford, John Bruning, Thomas Moseley, and Michael Vastine) discussed how material misrepresentation (fraud) arising in either a criminal or civil context can result in negative immigration consequences. They discussed three recent cases, *Shular v. United States*, *Maslenjak v. United States*, and *Patel v. U.S. Attorney General*. The panelists did a good job of using case law and hypotheticals. They did not utilize slides.

Eligibility for Permanent Residence Despite the Death of a Qualifying Relative or Sponsor During the COVID-19 Pandemic (01:00:07) (1 Law and Legal Credit)

The four panelists (attorneys Laura Flores Bachman, Brent Renison, Evangelize Abriel, and Caterina S. Kretz) discussed how attorneys can save petitions and applications for permanent residence for surviving family members. They shared many helpful strategies and tips. The panelists used PowerPoint presentations but still could be seen on a small screen. They did a good job of answering attendees' questions.

Consular Processing in a Pandemic (01:02:15) (1 Law and Legal Credit)

The four panelists (attorneys Christine Popp, Rebecca Kitson, Stephen Pattison, and Spojmie Nasiri) addressed some of the new problems that arisen with consular processing during the pandemic, including getting “stuck” cases scheduled or rescheduled, preparing clients for interviews scheduled with little notice after long waits, proving income after the 2020 economic downturn, deciphering COVID-19 vaccination requirements abroad, and dealing with humanitarian cases and dangerous country conditions. The panelists provided excellent practice advice, tips and tricks. They also did a good job of answering questions.

Prosecutorial Discretion: Where Does it Exist (01:01:01) (1 Law and Legal Credit)

The four panelists (attorneys Alyssa Nguyen, Michelle Saenz-Rodriguez, Maria Baldina-Potermin, and Shoba Sivaprasad Wadhia) discussed how OPLA attorneys are currently exercising prosecutorial discretion. The panelists used slides to discuss the DHS Memo: Guidelines for the

Enforcement of Civil Immigration Law and how prosecutorial discretion is applied across different parts of the country.

Our on Again, off Again: Strategies to Deal with Recent Challenges in Working With the Court

(01:02:00) (1 Law and Legal Credit)

The four panelists (attorneys Sui Chung, Jennifer Durkin, Merlyn Hernandez, and Homero López) discussed the problems and inconsistencies in the wake of courts reopening. They provided excellent practical tips and guidance on navigating scheduling orders, Webex hearings, and motions for administrative closure.

“We Must Keep Our Eyes Open”: Recent Changes in Attorney General and BIA Decisions

(01:01:12) (1 Law and Legal Credit)

The four panelists (attorneys Jonathan Willmoth, Dree Collopy, Joanna Gaughan, and Kendra Scheuerlein) discussed the practical implications of attorney general decisions on legal strategy. They also examined some of the biggest and most pressing decisions impacting asylum seekers. The panelists utilized slides to convey the presentation takeaways and good practice tips.

Supremely Noticed (01:00:09) (1 Law and Legal Credit)

The four panelists (attorneys Rekha Sharma-Crawford, Rex Chen, Karl William Krooth, and Ross Miller) discussed the impact of recent U.S. Supreme Court and circuit court rulings on immigration litigation practice. The panelists are well versed in immigration litigation and presented slides that contained helpful “winnable” tips.

Hot Topics in Business Immigration: Where Are We Now? (01:29:46) (1.5 Law and Legal Credit)

The four panelists (attorneys Robin D. O’Donoghue, Jennifer Minear, Vincent Lau, and Sharvari Dalal-Dheini) covered the prominent issues in current business immigration practice. The panelists also discussed recent Biden Administration announcement related to STEM Work Authorization, J-1 Researchers, National Interest Waivers, and O-1 Extraordinary Ability Workers. They had some technical difficulties at the start but worked through it. This session was very advanced CLE and geared toward practitioners well versed in the topics.

Navigating PERM in the Era of the Pandemic (01:01:04) (1 Law and Legal Credit)

The four panelists (attorneys Lisa York, Sarah Peterson, Janora Hawkins, and Mechelle Zarou) discussed how the global pandemic impacts PERM cases. They also explored how to handle novel PERM issues and provided updates on current PERM adjudication trends and processing times. The presenters used high level slides that only introduced the topics. The discussion between the presenters was very interactive and informative.

Tricky NIV Compliance Issues During and After COVID-19 Business (01:00:18) (1 Law and Legal Credit)

The four panelists (attorneys Dagmar Butte, Lorna De Bono, Vic Goal, and Laurie Woog) highlighted employment-based nonimmigrant visa compliance issues that have been exacerbated or created as a result of changes in the workplace due to COVID-19. The presenters utilized slides to cram a lot of information and tips into one hour.

Post-NIEs/Consular Catch Up (01:01:32) (1 Law and Legal Credit)

The four panelists (attorneys Bushra Malik, Daniel Parisi, Sandra Reguerin, and Christopher Richardson) presented the most up-to-date rules and processes for U.S. entry in our new pandemic world. The panelists advised on strategies and best practices for dealing with applications transitionally handled by consulates. The presenters did not use slides however, the presenters kept the discussion interesting and moving with a lot of helpful tips. One of the panelists is a former consular officer so they provided interesting views on why the consulates act the way they do.

The Future of Immigration Law Practice Management in A Post-Pandemic World (01:00:15)
(1 Other – Office Management Credit)

The four panelists (attorneys Reid Trautz, Ruby Lichte Powers, Laura Kelley and CLM Kristen Berg) provided practical tips on how to handle law practice issues related to the pandemic. They also advised on practicing in a post-pandemic world. The presenters gave a lot of real-life examples and drew heavily on their own experiences in managing their offices. The presentation did not substantively talk about the laws that impact office management, but rather best practices and explanations of how they handled situations. If the discussion focused on the laws, I would have kept this as a Law and Legal Credit.

Litigation Works! USCIS Processing Times and Delays, Unreasonable Denials, and NIV/IV Department of State Interview Issues for Business Clients (01:00:49) (1 Law and Legal Credit)

The four panelists (attorneys Lily Axelrod, Jeff Joseph, Charles Kuck, and Jesse Bless) explored how the explosion of federal litigation by the immigration bar continued to push back against federal government inaction and inappropriate denials, including consular processing delays, delays in adjudication of employment authorization and other applications. They also advised on the best practices for overcoming jurisdictional argument and recovering legal fees. The panelists provided updates on recent federal court decisions and the status of ongoing litigation against DHS and DOS. The presenters did not use slides. The presenters discussed helpful strategy in handling cases and addressing denials as well as preventing reinventing the wheel in arguments.

Cryptocurrency: What Immigration Lawyers Need to Know (01:03:27) (1 Law and Legal Credit)

The three panelists (attorneys Diane Butler, William Stock, and Silvina Tondini) explained how it is essential that immigration attorneys become well-versed in what it cryptocurrency is, how it works, and what it can and will be used for in the future. The presenters used slides and did a great job trying to explain complex technical terms and issues that do not historically intersect with immigration law but now could.

CONCLUSION

Overall, this was a conference made up of helpful tips and strategies for attorneys practicing immigration law. I would accredit the CLE as follows:

- 14 Law and Legal credits per Admission and Practice Rule 11(f)(1)
 - *Hot Topics in Removal Practice*
 - *Misrepresentation and Fraud in Crimmigration Issues*
 - *Eligibility for Permanent Residence Despite the Death of a Qualifying Relative or Sponsor*
 - *Consular Processing in a Pandemic*

- *Prosecutorial Discretion: Where Does it Exist*
 - *Our on Again, off Again: Strategies to Deal with Recent Challenges in Working With the Court*
 - *“We Must Keep Our Eyes Open” : Recent Changes in Attorney General and BIA Decisions*
 - *Supremely Noticed*
 - *Hot Topics in Business Immigration: Where Are We Now?*
 - *Navigating PERM in the Era of the Pandemic (*
 - *Tricky NIV Compliance Issues During and After COVID-19*
 - *Post-NIEs/Consular Catch Up*
 - *Litigation Works! USCIS Processing Times and Delays, Unreasonable Denials, and NIV/IV Department of State Interview Issues for Business Clients*
 - *Cryptocurrency: What Immigration Lawyers Need to Know*
- 1 Other- Office Management credit per Admission and Practice Rule 11(f)(5)
 - *The Future of Immigration Law Practice Management in A Post-Pandemic World*

| Accredited Sponsor | Dates Audited After 2016 |
|--|---|
| AILA | 9/25/2018. 9/5/2022 |
| Attorney Credits | 4/9/2019 |
| Clark County Bar Association | None – (on location only & currently cancelled until May 2020) |
| District of Columbia Bar | 4/24/19; 5/1/2022 |
| Intellectual Property Owners Association | 5/17/2021 |
| KCBA | 4/26/2019 |
| Law Seminars International | 5/9/2019 |
| Lawline.com | 8/11/2018 |
| Littler Mendelson | 8/5/2020 |
| Lorman Business Center | 2/26/2020, 12/15/2020, |
| National Academy of CLE | 11/17/2019, 1/5/2021 |
| National Law Foundation | 5/30/2019 |
| NBI | 7/31/17, 12/29/2020; 3/17/2022. Two AUDITS IN PROGRESS |
| Practising Law Institute | 8/1/2018; 5/10/2022 |
| Spokane County Bar Association | 3/6/2020 |
| The Seminar Group | 11/29/2018; 6/17/2022 |
| TRT, Inc. | 9/10/2018 |
| UW School of Law | 4/26/2021 |
| WA Association of Prosecuting Attorneys | None - on location only, only have CLEs in Olympia, Yakima, Leavenworth or Richland and they have currently cancelled all 2020 courses |
| WA Defense Trial Lawyers | 9/18/2019 |
| West LegalEdcenter | 10/17/2016; 8/23/2021; |
| WSBA CLE | 9/13/2019; 11/30/17; 6/13/17; 11/2/16; 6/24/2016; 5/2/2016 |
| WSAJ Legal Educational Seminars | 9/18/2019; 11/16/2016 |
| ProLawCLE | 9/20/2019; 7/29/2020 - NO LONGER ACCREDITED |
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| DISCUSSION: MCLE Updates |
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The MCLE Staff Liaison will provide general updates to the MCLE Board

Discussion Topics:

- **MCLE Certification**

MCLE certification is open for the 2020-2022 reporting period. As of December 27, 2022, approximately 41% of licensed legal professionals were compliant for their MCLE requirements.

- **MCLE Online System**

MCLE staff continues to work with the WSBA IT department to create and implement a new MCLE online system and database. The intent of the updated system is to improve the user experience for all users, allow all licensed legal professionals online access to their MCLE records, and to track the new MCLE ethics requirement.

- **Update on Suggested Amendment Regarding Credit for Law Clerk Tutors**

The Court approved the suggested amendment for publication by Court order 25700-A-1494, and have ordered:

(a) That pursuant to the provisions of GR 9(g), the suggested amendment as attached hereto is to be published for comment in the Washington Reports, Washington Register, Washington State Bar Association and Administrative Office of the Court's websites in January 2023.

(b) The purpose statement as required by GR 9(e), is published solely for the information of the Bench, Bar and other interested parties.

(c) Comments are to be submitted to the Clerk of the Supreme Court by either U.S. Mail or Internet E-Mail by no later than April 30, 2023. Comments may be sent to the following addresses: P.O. Box 40929, Olympia, Washington 98504-0929, or supreme@courts.wa.gov. Comments submitted by e-mail message must be limited to 1500 words.

- **WSBA COVID-19 Health and Safety Policy for Guests/Attendees at WSBA In-Person Meetings and Events**

Effective Nov 18th, 2022

As WSBA returns to in-person meetings, events, and gatherings, and in order to ensure consistent levels of safety for WSBA employees, volunteers, and guests at our in-person events, WSBA will follow the CDC's COVID-19 Community Level guidance provided at the CDC website. If state or local health authorities impose stricter requirements than the CDC, WSBA will comply with the state or local requirements in the area in which the event is held. These procedures will apply to WSBA in-person events (i.e., CLE seminars, receptions, retreats, committee and supreme court board meetings). These procedures do not apply to regulatory events (i.e., bar exam and regulatory hearings). Wherever possible, a virtual attendance option will be provided for any WSBA event or meeting. This policy is subject to change as the conditions related to the COVID-19 pandemic evolve, or other significant health and safety issues arise.

- **Budget**

The MCLE Board Staff Liaison will provide a brief overview of the MCLE Budget Summary.

Attachments:

- MCLE Budget Summary FY22
- MCLE Budget Summary October 2022 (FY23)
- Order 25700-A-1494
- WSBA COVID-19 Health and Safety Policy for Guests/Attendees at WSBA In-Person Meetings and Events