

**EXECUTIVE COMMITTEE MEETING
WSBA REAL PROPERTY, PROBATE & TRUST SECTION**

Friday, February 12, 2021
12:00 p.m. – 4:00 p.m.

[Zoom Conference Meeting](#)

Meeting ID: 826 7589 7385
Passcode: 748772

AGENDA

No.	Item	Ex Comm Member	Tab
1.	Call to Order, Welcome (Roster), Introductions, Establishment of Quorum	Lewis	A
2.	Approval of Minutes (October 9, 2020 Meeting)	Lewis	B
3.	Financial and Section Membership Report November Financials December Financials <i>Note: RPPT's fiscal year starts October 1</i>	Gorton	C
4.	Board of Governors <ul style="list-style-type: none"> • Introduction of BOG liaison (Brent Williams-Ruth) • Report on January 14-15 meeting • Inquiry Re: SB 5132 (Electronic Wills Act) • Upcoming BOG Meetings March 18-19, 2021 April 16-17, 2021 May 20-21, 2021 July 16-17, 2021 August 20-21, 2021 September 23-24, 2021 	Carr, McComb, Lee, Taylor Gorton	
5.	Newsletter Update	Rutberg	

No.	Item	Ex Comm Member	Tab
6.	Continuing Legal Education <ul style="list-style-type: none"> • Real Property • Probate & Trust • Mini CLE/Webinar 	McCullum Cashman Safren	
7.	Website and Technology Update	Safren	D
8.	Legislation <ul style="list-style-type: none"> • Real Property • Probate 	McComb/Benis Gorton/Cashman	
9.	Young Lawyers/Fellows Report	Lee, Li, Kaur, May	
10.	Section Leader Calls <ul style="list-style-type: none"> • WSBA Diploma Privilege • Remote Bar Exam 	Bennis	E
11.	Section Elections	Lewis	
12.	Midyear Meetings <ul style="list-style-type: none"> • 2021 – June 4-6 at Whitman Hotel, Walla Walla • 2022 – Skamania Lodge, Stevenson • 2023 – TBD 	Gorton McComb/Lewis Cashman	
13.	Open/New Business	Lewis	
14.	Adjourn/Expense Approval	Lewis	F

UPCOMING MEETINGS 2021

Friday, April 30, 2021: 12-4 pm (Zoom)
Saturday, June 5, 2021: 12-4 pm (mid-year, Walla Walla)

**WSBA Real Property, Probate, & Trust Section
Executive Committee 2020-2021**

SECTION OFFICERS

<p>Chair</p> <p>Brian Lewis (2) Ryan, Swanson & Cleveland PLLC 1201 3rd Avenue, Suite 3400 Seattle, WA 98101</p> <p>Phone: (206) 654-2206 Email: lewis@ryanlaw.com</p>	<p>Chair Elect & Secretary/Treasurer</p> <p>Tiffany Gorton (3) Kutcher Hereford Bertram Burkart 705 2nd Ave, Suite 800 Seattle, WA 98101</p> <p>Phone: (206) 382-4414 Email: tgorton@khbblaw.com</p>
<p>Real Property Council Director</p> <p>Devin P. McComb (4) Perkins Coie LLP 1201 Third Avenue, Suite 4900 Seattle, WA 98101-3099</p> <p>Phone: (206) 359-3260 Email: dmccomb@perkinscoie.com</p>	<p>Probate & Trust Council Director</p> <p>Anna Cashman (5) Kutcher Hereford Bertram Burkart 705 2nd Ave, Suite 800 Seattle, WA 98101</p> <p>Phone: (206) 382-4414 Email: acashman@khbblaw.com</p>
<p>Past Chair</p> <p>Stephanie Taylor (1) Randall Danskin, P.S. 601 West Riverside Avenue Spokane, WA 99201-0626</p> <p>Phone: (509) 747-2052 Email: srt@randalldanskin.com</p>	

(#) Denotes years remaining on committee.

COUNCIL MEMBERS

PROBATE AND TRUST	REAL PROPERTY
<p>Director</p> <p>Anna Cashman (5) Kutcher Hereford Bertram Burkart 705 2nd Ave, Suite 800 Seattle, WA 98101</p> <p>Phone: (206) 382-4414 Email: acashman@khbblaw.com</p>	<p>Director</p> <p>Devin P. McComb (4) Perkins Coie LLP 1201 Third Avenue, Suite 4900 Seattle, WA 98101-3099</p> <p>Phone: (206) 359-3260 Email: dmccomb@perkinscoie.com</p>
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<p>Elizabeth Stephan (1) Smith & Zuccarini, P.S. 2155 – 112th Avenue NE Bellevue, WA 98004</p> <p>Phone: (425) 289-2511 Email: e.stephan@smithzuccarini.com</p>	<p>Anna Revelle Stock (1) Cairncross & Hempelmann PS 524 2nd Ave, Ste 500 Seattle, WA 98104-2323</p> <p>Phone: (206) 587-0700 Email: astock@cairncross.com</p>
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<p>Lindsey Weidenbach Gatens Green Weidenbach, PLLC 305 Aplets Way Cashmere, WA 98815-1012</p> <p>Phone: (509) 662-3685 Email: lindsey@ggw-law.com</p>	<p>Keaton Hille (1) Hanson Baker Ludlow Drumheller P.S. 2229 - 112th Avenue NE, Suite 200 Bellevue, Washington 98004-2936</p> <p>Phone: (425) 454-3374 Email: khille@hansonbaker.com</p>

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WSBA

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Education Programs Manager Kevin Plachy (Interim Dir. of Advancement) Washington State Bar Association 1325 Fourth Avenue, Suite 600 Seattle, WA 98101 Phone: (206) 727-8225 Email: kevinp@wsba.org	Young Lawyer Liaison Harman Kaur Bual Firm – to be updated Phone: to be updated Email: harmankbual@gmail.com
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Executive Committee Meeting Minutes
WSBA Real Property, Probate & Trust Section

Friday, October 9, 2020

12:00 p.m. – 3:00 p.m.

Zoom Call

Minutes of Meeting

Present: Brian Lewis (chair), Tiffany Gorton, Anna Cashman, Jessica Carr, Jemima McCullum, Elizabeth Stephan, Maggie Lassen, Chris Benis, Lindsey Weidenbach, Keaton Hille, Michael Safren, Sharon Rutberg, Stephen King, Alysha Yagoda, Heidi Orr, Manpreet Kaur, Carol Li, Harman Bual, Mike Barrett

Not Present: Devin McComb, Stephanie Taylor, Anna Stock, Tom Lee, Michael May

1. Call to Order, Welcome (Roster), Introductions, and Establishment of Quorum.

Brian Lewis called the meeting to order at 12:07 p.m. Introductions of all members and council roles, including new fellows.

Quorum established.

2. Approval of Minutes (June 19, 2020, Executive Committee Meeting).

No discussion. Minutes approved as drafted.

3. Financial and Section Membership Report.

Brian reported on the financials. The section continues to be in good shape, with more funds than expected on hand because, as a result of the circumstances of the pandemic in 2020, expenses were reduced. Brian reported that the 2021 budget has been approved by WSBA. Review and discussion of memorandum dated September 8, 2020 from Kevin Plachy, Interim Advancement Department Director at WSBA regarding per member charge for sections. .

4. Board of Governors.

BOG Meeting Report – Jessica attended the meeting in June. Jessica reported that a key topic at the June meeting was a proposed update to the WSBA mission statement. Jessica reported that Devin and Tom attended the meeting in July.

Update on Legislative Committee – Discussion of update to the policy for sections to comment publicly on legislation that was recently adopted by the BOG. Discussion of process for review by

this section and its leadership for proposed legislation in future, given the timelines and requirements of the policy.

Upcoming BOG Meetings – There are a number of BOG meetings between now and the end of the year. Jessica, Elisabeth and Carol volunteered to attend. Members proposed that Devin be asked to volunteer for one or more 2020 BOG meetings and the BOG January meeting.

5. Newsletter Update. Sharon reported. Summer 2020 newsletter is being finalized and will be out in a few weeks. Moving forward with Fall 2020 with hopes to publish in late November. Discussion of request by senior law section to reprint an article that previously ran in the newsletter.

6. CLE Report.

RP - Jemima reported. She and Anna Stock are planning for the December 3 CLE. It will be a one-day CLE with approximately credits, to include 1 ethics credit, and will be entitled “2020, A Year to Remember: Pandemics, Public Demonstrations, and Wildfires.”

PT – Anna Cashman and Tiffany reported. They will be speaking in a breakout directly after this meeting to plan the upcoming CLE, which is scheduled for December 4. Discussion of challenges of remote CLEs and requirements for live presentation.

7. Website and Technology Update.

Michael S. reported that there are 2,240 section members. There were 885 distinct visitors to the section website in the last reporting period, with 1,174 unique page views.

8. Legislation.

RP – Chris reported. Nothing currently being considered but expects a busy session in 2021, with lots of pandemic-driven legislation.

PT – Tiffany reported. An EC subgroup continued to work on RCW 11.68 and 11.96A changes relating to Rathbone. Tiffany is also working on coordinating review of various uniform acts by EC subgroup(s). With respect to proposals regarding estate tax legislation, Jessica is continuing to work on connecting with members of the tax section, in particular the estate and gift tax subcommittee, to address questions regarding calculation of tax and related matters.

9. Young Lawyer Fellows Report

Carol reported. Continuing to plan for a CLE, expect materials to be done in about a month. Carol plans to connect with Harman now that she has been appointed as liaison to the young lawyers section. Discussion of a planned outreach at Gonzaga law. Discussion of deadline for fellow application.

10. Section Leaders Call. Chris has continued to attend the section leader calls. He reports that the calls continue to function as a way for the sections to work together on CLEs and exchange operational ideas.

11. Midyear Meeting. The 2021 midyear meeting is planned for June 4-6 at the Whitman Hotel in Walla Walla. Tiffany reported that a co-chair from the RP side is still needed. The 2022 midyear meeting is planned for Skamania from June 5-7. Nothing is on the calendar yet for 2023.

12. EC Retreats. Tiffany reported. The location for the EC retreats for 2021 and 2022 have not yet been chosen. Tiffany is in charge of making the selection.

13. New Business.

Record of EC Service: Brian reported that we have a historical record of who has served on the EC, last updated in approximately 2017. Brian and Heidi plan to work with Stephanie to update that document.

Listserv Access: Discussion of unauthorized access to RPPT listservs by non-practitioners and steps to address the same.

14. Expenses.

There were no lunch expenses to approve due to the meeting being held online.

Meeting of the full EC adjourned at 2:06 p.m. The PT council had a breakout meeting.

Washington State Bar Association

Statement of Activities

For the Period from November 1, 2020 to November 30, 2020

16.67% OF YEAR COMPLETE

	FISCAL 2021 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET
REAL PROPERTY, PROBATE & TRUST SECTION					
REVENUE:					
INTEREST - INVESTMENTS	500.00	-	-	500.00	0.00%
SECTION DUES REVENUE	56,875.00	25.00	175.00	56,700.00	0.31%
SEMINAR SPLITS W/ CLE	36,000.00	-	-	36,000.00	0.00%
TOTAL REVENUE:	93,375.00	25.00	175.00	93,200.00	0.19%
DIRECT EXPENSES:					
CONFERENCE CALLS	100.00	-	152.25	(52.25)	152.25%
PER MEMBER CHARGE	41,359.50	18.18	127.26	41,232.24	0.31%
LEGISLATIVE/LOBBYING	500.00	-	-	500.00	0.00%
NEWSLETTER EXPENSES	2,000.00	-	-	2,000.00	0.00%
WEBSITE EXPENSES	5,000.00	2,400.00	2,400.00	2,600.00	48.00%
MINI-CLE EXPENSE	224.00	-	-	224.00	0.00%
SEMINAR EXPENSE - SECTIONS	6,000.00	-	-	6,000.00	0.00%
MEMBERSHIP & RECRUITING EXP	500.00	-	-	500.00	0.00%
NEW LAWYER OUTREACH	1,000.00	-	-	1,000.00	0.00%
SCHOLARSHIPS/DONATIONS/GRANT	7,000.00	-	-	7,000.00	0.00%
ATTENDANCE AT BOG MEETINGS	1,000.00	-	-	1,000.00	0.00%
EXECUTIVE COMMITTEE EXPENSES	10,000.00	-	-	10,000.00	0.00%
EXECUTIVE COMM EXP - OTHER	16,000.00	-	-	16,000.00	0.00%
LDSHIP/PROF DEVELOP/RETREATS	20,000.00	-	-	20,000.00	0.00%
TOTAL DIRECT EXPENSES:	110,683.50	2,418.18	2,679.51	108,003.99	2.42%
NET INCOME:	(17,308.50)	(2,393.18)	(2,504.51)		
FUND BALANCE AS OF 9/30/20:	66,300.53		66,300.53		
NEW FUND BALANCE:	48,992.03		63,796.02		

Detail Trial Balance

Wednesday, January 6, 2021 7:09 PM

Includes Activities from November 1, 2020 to November 30, 2020

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Washington State Bar Association

WSBA\ DARSHITAP

Accounts without activities or balances during the above period are not included.

G/L Account: No.: 40000..59999, Global Dimension 1 Filter: SRPPT

Posting Date	Document No.	Source No.	DEPT	JOB	Description	Debit Activities	Credit Activities	Balance
Account: 48200		SECTION DUES REVENUE			Beginning Balance			-150.00
11/30/2020	T11302020		SRPPT		Section Dues Revenue - SRPPT		25.00	
Account: 48200		SECTION DUES REVENUE			Beginning Balance			-150.00
					Total Activities	0.00	25.00	-25.00
Account: 48200		SECTION DUES REVENUE			Ending Balance			-175.00
Account: 50165		CONFERENCE CALLS			Beginning Balance			152.25
Account: 50165		CONFERENCE CALLS			Ending Balance			152.25
Account: 58400		PER MEMBER CHARGE			Beginning Balance			109.08
11/30/2020	1120MISC		SRPPT		11/20 Per-Member Charge	18.18		
Account: 58400		PER MEMBER CHARGE			Beginning Balance			109.08
					Total Activities	18.18	0.00	18.18
Account: 58400		PER MEMBER CHARGE			Ending Balance			127.26
Account: 58675		WEBSITE EXPENSES			Beginning Balance			0.00
11/17/2020	PI+152029	V7989	SRPPT		PID10872 RPPT Sect- Yrly subs/12/01/20 First Step Internet	2,400.00		
Account: 58675		WEBSITE EXPENSES			Beginning Balance			0.00
					Total Activities	2,400.00	0.00	2,400.00
Account: 58675		WEBSITE EXPENSES			Ending Balance			2,400.00
					Report Total Beginning Balance			111.33
					Report Total Activities	2,418.18	25.00	2393.18
					Report Total Ending Balance			2,504.51

Washington State Bar Association

Statement of Activities

For the Period from December 1, 2020 to December 31, 2020

25.00% OF YEAR COMPLETE

	FISCAL 2021 BUDGET	CURRENT MONTH	YEAR TO DATE	REMAINING BALANCE	% USED OF BUDGET
REAL PROPERTY, PROBATE & TRUST SECTION					
REVENUE:					
INTEREST - INVESTMENTS	500.00	-	-	500.00	0.00%
SECTION DUES REVENUE	56,875.00	375.00	550.00	56,325.00	0.97%
SEMINAR SPLITS W/ CLE	36,000.00	-	-	36,000.00	0.00%
TOTAL REVENUE:	93,375.00	375.00	550.00	92,825.00	0.59%
DIRECT EXPENSES:					
CONFERENCE CALLS	100.00	-	152.25	(52.25)	152.25%
PER MEMBER CHARGE	41,359.50	272.70	399.96	40,959.54	0.97%
LEGISLATIVE/LOBBYING	500.00	-	-	500.00	0.00%
NEWSLETTER EXPENSES	2,000.00	-	-	2,000.00	0.00%
WEBSITE EXPENSES	5,000.00	-	2,400.00	2,600.00	48.00%
MINI-CLE EXPENSE	224.00	-	-	224.00	0.00%
SEMINAR EXPENSE - SECTIONS	6,000.00	-	-	6,000.00	0.00%
MEMBERSHIP & RECRUITING EXP	500.00	-	-	500.00	0.00%
NEW LAWYER OUTREACH	1,000.00	-	-	1,000.00	0.00%
SCHOLARSHIPS/DONATIONS/GRANT	7,000.00	-	-	7,000.00	0.00%
ATTENDANCE AT BOG MEETINGS	1,000.00	-	-	1,000.00	0.00%
EXECUTIVE COMMITTEE EXPENSES	10,000.00	-	-	10,000.00	0.00%
EXECUTIVE COMM EXP - OTHER	16,000.00	-	-	16,000.00	0.00%
LDSHIP/PROF DEVELOP/RETREATS	20,000.00	-	-	20,000.00	0.00%
TOTAL DIRECT EXPENSES:	110,683.50	272.70	2,952.21	107,731.29	2.67%
NET INCOME:	(17,308.50)	102.30	(2,402.21)		
FUND BALANCE AS OF 9/30/20:	66,300.53		66,300.53		
NEW FUND BALANCE:	48,992.03		63,898.32		

Detail Trial Balance

Tuesday, January 19, 2021 5:59 PM

Includes Activities from December 1, 2020 to December 31, 2020

Page 1

Washington State Bar Association

WSBA\ DARSHITAP

Accounts without activities or balances during the above period are not included.

G/L Account: No.: 40000..59999, Global Dimension 1 Filter: SRPPT

Posting Date	Document No.	Source No.	DEPT	JOB	Description	Debit Activities	Credit Activities	Balance
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12/31/2020	T12312020		SRPPT		Section Dues Revenue - SRPPT		375.00	
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					Total Activities	0.00	375.00	-375.00
Account: 48200		SECTION DUES REVENUE			Ending Balance			-550.00
Account: 50165		CONFERENCE CALLS			Beginning Balance			152.25
Account: 50165		CONFERENCE CALLS			Ending Balance			152.25
Account: 58400		PER MEMBER CHARGE			Beginning Balance			127.26
12/31/2020	1220MISC		SRPPT		12/20 Per-Member Charge	272.70		
Account: 58400		PER MEMBER CHARGE			Beginning Balance			127.26
					Total Activities	272.70	0.00	272.70
Account: 58400		PER MEMBER CHARGE			Ending Balance			399.96
Account: 58675		WEBSITE EXPENSES			Beginning Balance			2,400.00
Account: 58675		WEBSITE EXPENSES			Ending Balance			2,400.00
					Report Total Beginning Balance			2,504.51
					Report Total Activities	272.70	375.00	-102.3
					Report Total Ending Balance			2,402.21

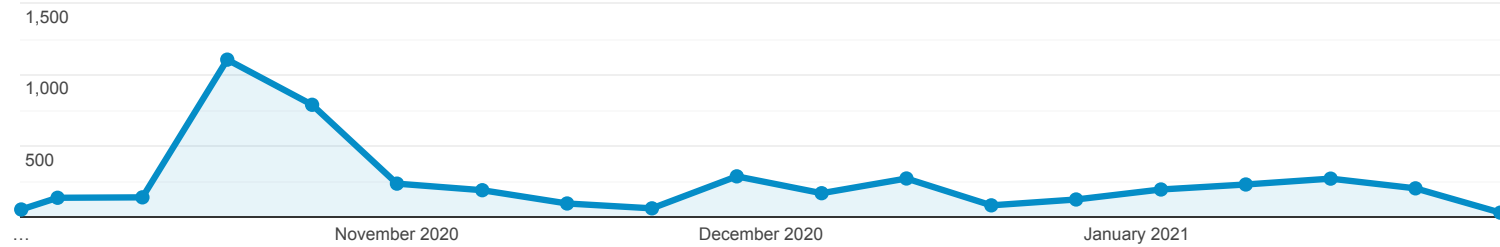
Content Drilldown

Oct 1, 2020 - Jan 31, 2021

All Users
100.00% Pageviews

Explorer

Pageviews



Page path level 1	Pageviews	Unique Pageviews	Avg. Time on Page	Bounce Rate	% Exit
	4,679 % of Total: 100.00% (4,679)	3,170 % of Total: 100.00% (3,170)	00:00:49 Avg for View: 00:00:49 (0.00%)	45.02% Avg for View: 45.02% (0.00%)	27.44% Avg for View: 27.44% (0.00%)
1. /Private/	986 (21.07%)	763 (24.07%)	00:01:01	35.71%	18.05%
2. /	965 (20.62%)	707 (22.30%)	00:00:43	44.95%	38.24%
3. /Login.aspx?path=/private/DrawOneNewsletter.aspx?DocumentID=170	658 (14.06%)	386 (12.18%)	00:00:34	28.65%	22.19%
4. /private/	630 (13.46%)	345 (10.88%)	00:01:01	50.00%	32.06%
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19. /DrawOnePage.aspx?PageID=66	27 (0.58%)	25 (0.79%)	00:00:13	100.00%	18.52%
20. /legislation/	22 (0.47%)	17 (0.54%)	00:02:13	100.00%	22.73%
21. /DrawOnePage.aspx?PageID=119	20 (0.43%)	18 (0.57%)	00:00:38	66.67%	55.00%

22.	/Login.aspx?path=/Private/Content/News/RPPT Summer2020 Newsletter.pdf	17 (0.36%)	9 (0.28%)	00:00:40	75.00%	47.06%
23.	/for-members/	15 (0.32%)	11 (0.35%)	00:00:09	66.67%	26.67%
24.	/Controls/	14 (0.30%)	10 (0.32%)	00:00:33	0.00%	35.71%
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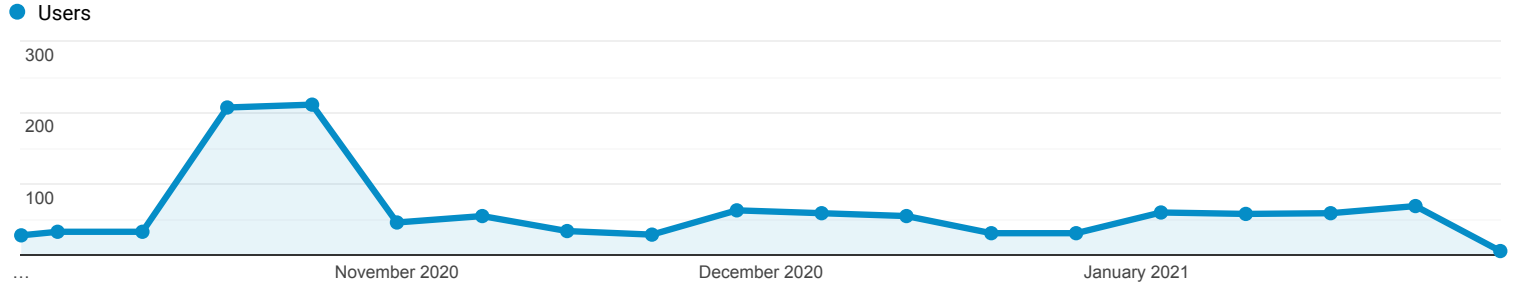
Rows 1 - 25 of 79

Audience Overview

Oct 1, 2020 - Jan 31, 2021

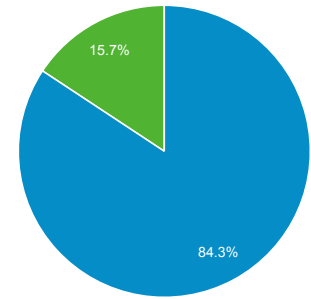
All Users
100.00% Users

Overview



Users 1,035	New Users 960	Sessions 1,284
Number of Sessions per User 1.24	Pageviews 4,679	Pages / Session 3.64
Avg. Session Duration 00:02:10	Bounce Rate 45.02%	

■ New Visitor ■ Returning Visitor



City	Users	% Users
1. Seattle	195	18.34%
2. Beijing	87	8.18%
3. (not set)	41	3.86%
4. Spokane	39	3.67%
5. Bellevue	30	2.82%
6. Tacoma	29	2.73%
7. Ashburn	26	2.45%
8. Vancouver	23	2.16%
9. Shanghai	21	1.98%
10. San Jose	20	1.88%

Acquisition Overview

Oct 1, 2020 - Jan 31, 2021

All Users
100.00% Users

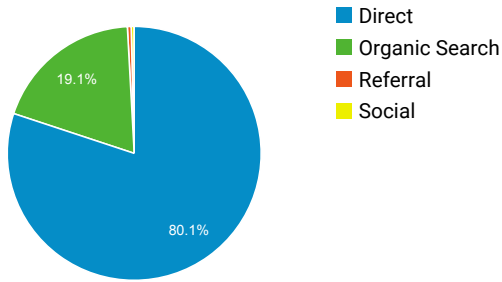
Primary Dimension:

Conversion:

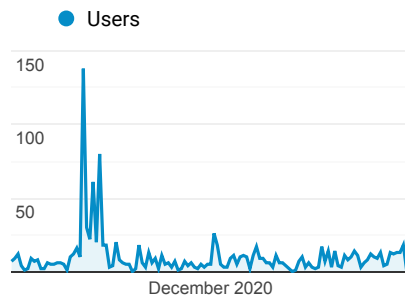
Top Channels ▾

All Goals ▾

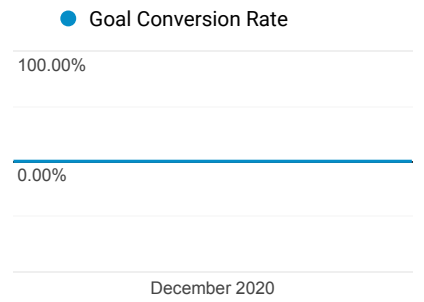
Top Channels



Users



Conversions



Acquisition

Behavior

	Users ↓	New Users ↓	Sessions ↓	Bounce Rate ↓	Pages / Session ↓	Avg. Session Duration ↓
	1,035	960	1,284	45.02%	3.64	00:02:10
1 Direct	836	<div style="width: 88%;"></div>		44.02%	<div style="width: 88%;"></div>	
2 Organic Search	199	<div style="width: 21%;"></div>		48.85%	<div style="width: 53%;"></div>	
3 Referral	5	<div style="width: 0%;"></div>		28.57%	<div style="width: 28%;"></div>	
4 Social	4	<div style="width: 0%;"></div>		75.00%	<div style="width: 75%;"></div>	

Conversions



Set up a goal.

To see outcome metrics, define one or more goals.

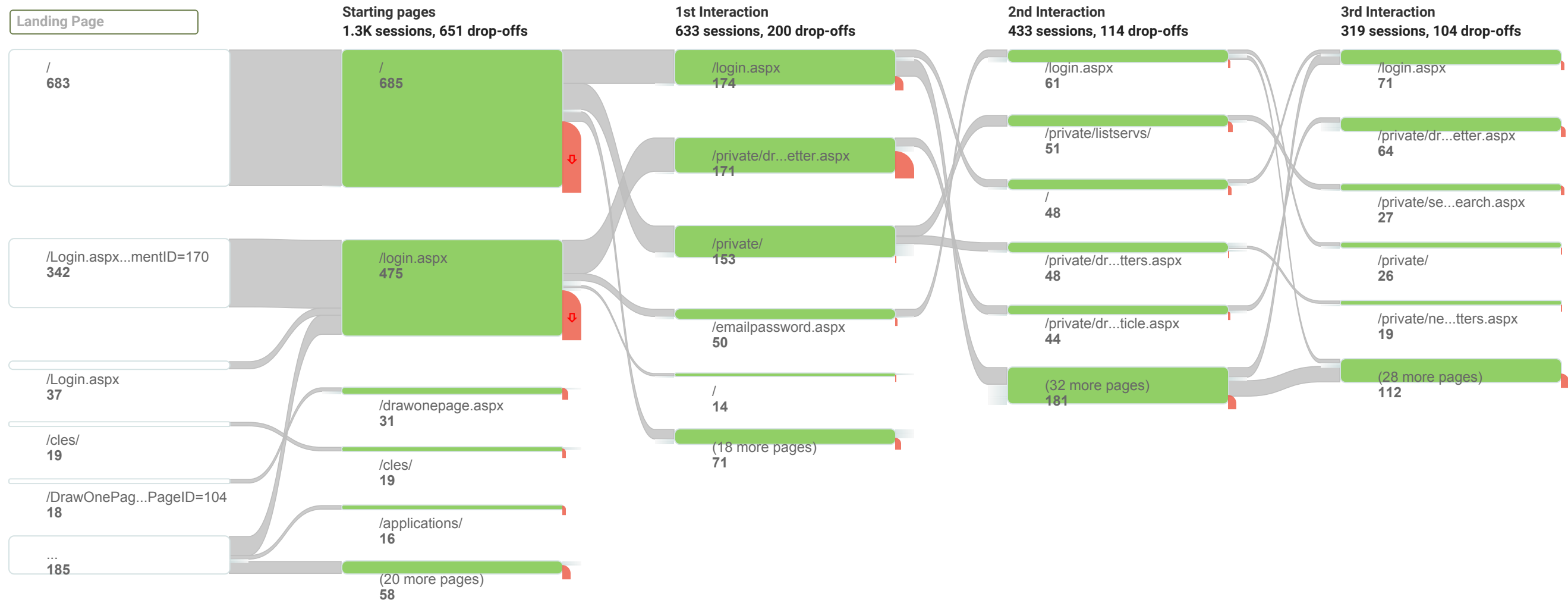
GET STARTED

To see all 4 Channels click [here](#).

Oct 1, 2020 - Jan 31, 2021

Behavior Flow

All Users
100.00% Sessions



Search Terms

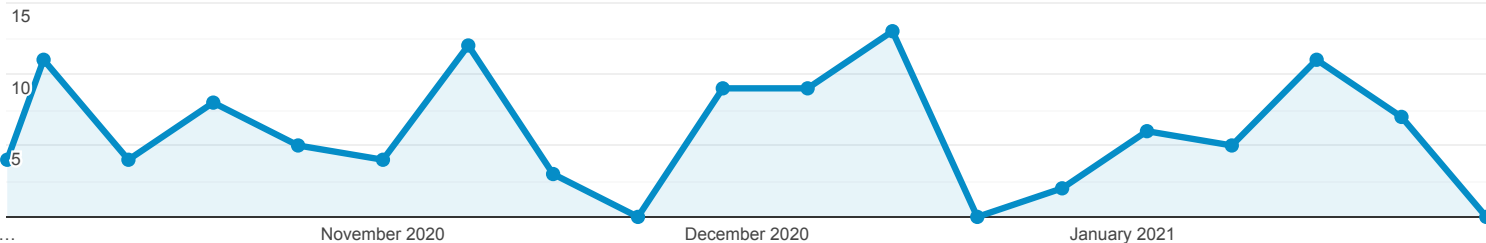
Oct 1, 2020 - Jan 31, 2021

All Users
100.00% Total Unique Searches

Explorer

Site Usage

● Total Unique Searches



Search Term	Total Unique Searches	Results Pageviews / Search	% Search Exits	% Search Refinements	Time after Search	Avg. Search Depth
	113 % of Total: 100.00% (113)	1.90 Avg for View: 1.90 (0.00%)	43.36% Avg for View: 43.36% (0.00%)	25.12% Avg for View: 25.12% (0.00%)	00:01:58 Avg for View: 00:01:58 (0.00%)	0.55 Avg for View: 0.55 (0.00%)
1. decanting	3 (2.65%)	1.00	100.00%	0.00%	00:00:00	0.00
2. forms	2 (1.77%)	1.00	0.00%	50.00%	00:00:31	0.50
3. joint probate	2 (1.77%)	5.50	100.00%	0.00%	00:02:37	0.00
4. moratorium	2 (1.77%)	2.50	0.00%	20.00%	00:28:00	2.00
5. qprt	2 (1.77%)	2.00	100.00%	0.00%	00:01:04	2.00
6. "administrative trustee"	1 (0.88%)	1.00	0.00%	100.00%	00:00:12	0.00
7. "competent witness"	1 (0.88%)	1.00	100.00%	0.00%	00:00:00	0.00
8. "death tax credit"	1 (0.88%)	2.00	100.00%	0.00%	00:00:22	0.00
9. "FULFILLMENT DEED"	1 (0.88%)	1.00	100.00%	0.00%	00:00:00	0.00
10. "power of attorney"	1 (0.88%)	1.00	100.00%	0.00%	00:00:00	0.00
11. "shannon scott"	1 (0.88%)	3.00	0.00%	0.00%	00:01:10	2.00
12. 1%	1 (0.88%)	2.00	0.00%	50.00%	00:00:13	0.00
13. 11.98.200	1 (0.88%)	1.00	0.00%	100.00%	00:00:17	0.00
14. 11.98B	1 (0.88%)	1.00	100.00%	0.00%	00:00:00	0.00
15. 48.18.410	1 (0.88%)	1.00	100.00%	0.00%	00:00:00	0.00
16. 6166	1 (0.88%)	1.00	100.00%	0.00%	00:00:00	0.00
17. 6166 lien	1 (0.88%)	2.00	0.00%	50.00%	00:01:03	0.00
18. administrative trustee flat fee	1 (0.88%)	1.00	0.00%	100.00%	00:00:13	0.00
19. adverse possession	1 (0.88%)	1.00	100.00%	0.00%	00:00:00	0.00
20. attorney as personal representative	1 (0.88%)	2.00	0.00%	0.00%	00:11:16	1.00

21. boulder montana	1 (0.88%)	1.00	0.00%	100.00%	00:00:29	0.00
22. boulder, mt	1 (0.88%)	1.00	0.00%	100.00%	00:00:23	0.00
23. butte	1 (0.88%)	1.00	0.00%	100.00%	00:00:34	0.00
24. clark county	1 (0.88%)	1.00	0.00%	100.00%	00:00:20	0.00
25. commercial eviction	1 (0.88%)	5.00	100.00%	0.00%	00:01:01	0.00

Rows 1 - 25 of 107

PLACEHOLDER FOR
E - Section Leader Calls

See reverse side for WSBA Expense Policy summary. Please fill out completely and legibly. Reimbursement checks will be payable only to the person/entity incurring the expense, as documented by itemized receipts. **Signed expense reports must be submitted within 60 days of incurring the expense; for expenses incurred in August and September, all forms must be submitted within 30 days of the WSBA fiscal year end (September 30).**

To expedite reimbursement, email one PDF of this form and itemized receipts to your staff liaison at wsba.org.

Otherwise, mail to: Washington State Bar Association, 1325 4th Avenue, Suite 600, Seattle, WA 98101-2539

<input type="checkbox"/> Employee <input type="checkbox"/> Board <input type="checkbox"/> Committee <input type="checkbox"/> Council <input type="checkbox"/> Taskforce <input type="checkbox"/> Other:	<input type="checkbox"/> CLE <input type="checkbox"/> Section <input type="checkbox"/> Witness <input type="checkbox"/> Panel	Make check payable to (print): Street Address, including City, State, Zip: <input type="checkbox"/> Check if new address E-mail: _____ Bar #: _____ Phone: _____
Staff Liaison: _____		By my handwritten or typed signature below, I certify that: (1) these expenses comply with the WSBA Expense Policy; (2) I am the person or entity entitled to receive reimbursement for these expenses; and (3) these expenses have not been reimbursed by any other source. X: _____ Date: _____

EXPENSE REIMBURSEMENT REQUEST (Itemized receipts required. For handwritten forms use INK only.)

Expense Date:							Category Totals
Event Date:							
Event Name:							
Event Location:							
Transportation	Auto Mileage Total (\$ 0.56/mi)	miles	miles	miles	miles	miles	
	Ground Transportation, Parking, Tolls						
	Airfare (coach/economy only)						
Meals	Breakfast (up to \$18)						
	Lunch (up to \$19)						
	Dinner (up to \$34)						
Lodging (up to \$175/night; \$200/night in Seattle; + tax)							
Other Expenses (itemize):							
Totals							

I certify that the amount(s) shown above were partially or fully expended for Washington State Bar Association business purposes. I also certify that I, or a person with whom I reside, has paid the amount(s) identified in full, and no reimbursement of this expense has been or will be sought or accepted from any other source. I further certify that this reimbursement does not exceed the amount(s) paid for the phone and or internet services. The information provided within this form is accurate and true.

EXPENSE AFFIDAVIT REQUIRED IF DETAILED RECEIPT IS MISSING
(No more than \$75 may be reimbursed without itemized receipt)

By my handwritten or typed signature below, I certify that I incurred the following cost(s) and that I am not seeking reimbursement for alcohol:

Name of Vendor:

Date of Purchase:

Item(s) Description:

Amount Paid: \$

Brief Description of why there is no itemized receipt:

Signature of Purchaser:

Date:

SUMMARY OF WSBA EXPENSE POLICY

GENERAL PRINCIPLE

WSBA depends upon and values the time and talent of its employees and volunteers. As a steward of member funds, WSBA asks for employees and volunteers to help save costs. ***WSBA will reimburse out-of-pocket expenses incurred in connection with WSBA business or meetings that are: (1) reasonable, (2) necessary, and (3) appropriately documented, as set forth in the WSBA Expense Policy. WSBA will not reimburse expenses that are reimbursed from another source; and will not reimburse expenses incurred by spouses, domestic partners or guests, except as otherwise provided by the WSBA Expense Policy.***

REIMBURSABLE EXPENSES

In accordance with IRS requirements, any person seeking reimbursement from WSBA must submit a signed, dated WSBA Expense Report, supported by detailed receipts. In the absence of a detailed receipt, up to \$75 may be reimbursed by completing the Expense Affidavit Form located on the front page of this Expense Report.

Meetings: WSBA encourages virtual meetings whenever feasible to accomplish committee, task force, panel, council and section work. Reimbursement of travel expenses to board, committee, task force, council, panel, and section members residing out of state to attend their meetings is limited to the approximate cost of in-state travel.

Transportation: *If travel is necessary, WSBA will reimburse the lesser of coach-economy air fare or auto mileage. If you drive, WSBA will not reimburse for lodging en route, and will only reimburse the lesser cost of coach-economy airfare. Reimbursement for out-of-state meeting travel is limited to the approximate cost of in-state travel (the cost of traveling from the nearest Washington border).*

1. **Auto Mileage** will be reimbursed at the IRS Standard Mileage Rate. *Carpooling is encouraged.*
2. **Rental Cars/Other** may be used only when economical compared to other modes of local transportation or if local transportation is nonexistent. Rental charges should be net of any discounts and will be limited to the rental cost of compact or standard-size cars. Reimbursement for any other method of travel (e.g., train) will be reimbursed for the cost of the most economical method of travel.
3. **Ground transportation, parking, tolls:** If travel is by air, please park and shuttle economically. WSBA will reimburse longer term airport parking at the lower of actual parking costs or an airport shuttle to/from your home.
4. **Airfare:** WSBA will only reimburse coach/economy-class air fares. Please book well in advance to obtain lowest possible fares. WSBA reserves the right not to fully reimburse for fares booked less than two weeks in advance of travel. WSBA will not reimburse for use of frequent flyer coupons or air miles. *(Receipt must include name of passenger, credit card used for payment, confirmation that flight was paid in full, date of flight, and departure and destination locations. Credit card statements are not sufficient.)*

Lodging: *If an overnight stay is necessary (contact your Staff Liaison in advance with any questions), WSBA will reimburse up to the amounts noted on the front page of this Expense Report. Ask your Staff Liaison about WSBA negotiated rates at area hotels. WSBA will not reimburse incidental charges such as entertainment, personal phone calls, etc. (Reimbursement receipts must include name/location of hotel, guest name(s), date(s) of stay, and breakdown of charges for lodging, meals, telephones, and incidentals).*

Meals: WSBA will reimburse meal expenses (including gratuity), up to the amounts noted on the front page of this Expense Report. In the event of lost receipts, WSBA will reimburse the lower of these rates or the federal per diem rate for the location in which the meal expense was incurred (see www.gsa.gov/perdiem). All-day travelers may reallocate per-meal allowances (e.g., spend more on lunch; less on dinner). Identify all individuals included in a meal reimbursement request.

Note: Alcohol will not be reimbursed and must be segregated from meal expenses.

Other expenses: WSBA will reimburse necessary out-of-pocket office expenses with receipts (actual copying charges up to 15 cents a page; faxes up to 25 cents a page, with a \$5 maximum). WSBA will not reimburse standard office services (e.g., voice mail, telephone connections), personnel costs or professional services.