**Executive Committee Meeting**
**WSBA Real Property, Probate & Trust Section**
Friday, February 10, 2017 11:00 a.m.
Washington Trust Bank - Seattle, WA

AGENDA

| | Item | Excom Member | Tab |
|---|---|---|---|
| 1. | Call to Order, Welcome, Introductions, and Establishment of Quorum | McCormick | |
| 2. | Approval of Minutes of November 2016 Meeting | Gatens | 13 |
| 3. | Financial and Section Membership Report | Reed | 14 |
| 4. | Website and Technology Update<br>New Assistant Web-editor | Lueders/Safren | 15 |
| 5. | Board of Governors<br>January BOG Meeting WSBA Bylaws Amendment<br>Upcoming BOG Meetings | <br>McCormick<br>Taylor/Gorton/King | <br><br>16 |
| 6. | Report on Open Section Night – Seattle | Gorton/Flatt | |
| 7. | Continuing Legal Education<br>Real Property<br>Probate & Trust | <br>Fitzsimmons<br>Taylor | |
| 8. | Newsletter Update | Cashman | |
| 9. | Mini-CLE Proposals | Fitzsimmons/Reed | |
| 10. | Scholarship Report | Hefta/McLeod | 17 |
| 11. | Legislation<br>Real Property<br>Probate | <br>Fitzsimmons<br>Taylor | |
| 12. | Young Lawyer/Fellows Report | Firuz/Flatt/Keaton | |
| 13. | Fellow Applications | McCormick | 18 |

| | Item | Excom Member | Tab |
|---|---|---|---|
| 14. | Midyear Meetings<br>2017 (Walla Walla)<br>2018 (Suncadia) | <br>Reed<br>Fitzsimmons | |
| 15. | 2017 Retreat | Reed | |
| 16. | Approval of Expenses | McCormick | |
| 17. | Adjourn to Council Meetings | | |

**Upcoming events:**

| | |
|---|---|
| April 7, 2017 – | Spring Real Estate Litigation CLE |
| April 21, 2017 – | Spring Trust and Estate Litigation seminar |
| June 9 – 11, 2017 - | Midyear Conference |

**Next meeting:**

April 14, 2017
Washington Trust Bank
Two Union Square
604 Union St.
Suites TBD
Seattle, WA 98101

TAB 13

November 2016 Meeting Minutes

Washington State Bar Association Real Property, Probate and Trust Section
Executive Committee Meeting

November 18, 2016
Lane Powell PC
Washington Trust Bank

Minutes of Meeting

Present: Jody McCormick, Annie Fitzsimmons, Danielle Flatt, Keaton Hille, Paul Firuz, Jennifer King, Michael Safren, Rhys Hefta, Sherry Bosse-Lueders, Tiffany Gorton, Sarah MacLeod, RoseMary Reed, Heidi Orr, Tim Burkart, Anna Cashman

Also Present: Nathan Smith, Scott Hildebrand (via telephone)

Not Present: Clay Gatens, Brian Lewis, Stephanie Taylor, Jessica Allen

**1. Call to order, welcome, introductions and establishment of quorum.**

Meeting called to order at 11:05am and quorum established.

**2. Introduction of Young Lawyer Liaison, New BOG Liaison, Updated Roster.**

Jody McCormick introduced new Young Lawyer Liaison, Keaton Hille from Hansonn Baker in Bellevue, who is a real property attorney. Jody McCormick noted our new BOG Liaison, Kim Risenmay, and the new WSBA education programs lead, Sondra Livingston-Carr.

**3. Approval of Minutes of September 2016 Meeting.**

Executive Committee noted name misspellings. Heidi Orr made a motion to approve minutes as amended with corrected name spellings. Annie Fitzsimmons seconded. All approved.

**4. Financial and Section Membership Report.**

RoseMary Reed gave the Financial Report with financials reported through August 2016.

The Section budgeted 2500 members, ended up with 2498 for the fiscal year.

The RPPT exceeded revenues for CLE for the year.

Changes to the financial report to end of fiscal year (end of September), include: $4,800 revenue from midyear and expenses for retreat. Spent down some of fund balance and ran a $6,500 loss for total fund balance of $113,638 for the beginning of next fiscal year.

Depending on outcome of BOG meeting today, the Section financials may move over to a calendar year instead of fiscal year, so financials may look different next fiscal year.

**5. Website and Technology Update.**

Sherry Bosse-Lueders gave the website and technology report. Sherry reported on the Russian touches on website, explaining that the website is hit by bots for less than a second and the Section shouldn't be too worried about it.

Listserv is currently at 665 members for Probate and trust and 535 for Real Property in August.

Newsletter posted to website today – listserv blast will go out today. WSBA eblast will go out 1st week of December.

**6. Approved Budget.**

No report.

**7. Board of Governors.**

**a. WSBA Bylaws Amendment – RPPT Letter**

Jody McCormick reported that there is a BOG meeting today with WSBA bylaw amendments being voted on. Likely RPPT can take any changes to the bylaws in stride. Only concern is that council members would be expected to have 3 year terms instead of our current 2 year terms, and we are unsure whether there is any flexibility on timing or whether this is a mandate.

RoseMary Reed reported that the changes came out of the Sections Policy workgroup. The WSBA wants at large member terms to be same for all Sections and have elections every 3 years. There was an issue of the same members in leadership roles for long periods of time. Nothing else in agenda for BOG meeting for today was a surprise.

**b. Upcoming BOG Meetings**

Tiffany Gorton attended the September BOG meeting – nothing of substance to report.

Jennifer King is attending BOG meeting today and will report back at next meeting.

Stephanie Taylor will attend December BOG meeting in Spokane.

**c. Section Leaders' Meeting**

Jody McCormick reported on the Section Leaders Meeting. The WSBA tried to keep the meeting positive and productive. However, the meeting began to get negative with certain Section leaders. There is concern with Section Executive Committees spending too much money on EC expenses, however, the percentage of EC expenses for RPPT do not take into account revenue brought into WSBA.

RoseMary Reed added that in calculating EC expenses, many member benefits are derived from the portion of the chart dedicated to EC expenses such as attendance at BOG meetings, legislative committee work, and newsletter meetings, which directly give members benefits.

**8. Report on Open Section Night – Spokane Open Section Night – Seattle – 1/19/17 – 5 to 7PM.**

Jody McCormick reported that Open Section Night in Spokane was well attended. The RPPT gave away Amazon gift card, and gave away midyear scholarship to Steven Lund. Next open Section night is in January at WSBA conference center.

**9. Section Leaders' Toolbox.**

Jody McCormick gave handout for useful material from WSBA.

**10. Continuing Legal Education.**

**a. Real Property**

Annie Fitzsimmons reported that there was a good agenda for Dec 16 CLE. 6.25 hours with 3 ethics hours. Scott Hidebrand is looking to secure a full judge panel for ethics credits

Danielle Flatt reported that she is looking for mentors for lunchtime mentoring session for new lawyers. Goal is for 1 mentor for every 3-4 mentees.

**b. Probate & Trust**

Tiffany Gorton reported that the December 6th CLE is all set - 6 hours of education with 1 hour of ethics. WSBA Eblast has gone out and she is currently working on listserv notice.

Paul Firuz reported on the fellows lunchtime mentorship program. The WSBA is coordinating conference room, sign-up, and providing lunch for new attorneys and mentors. On PT side there are currently more mentors than mentees for Dec 6 CLE.

## 11. Newsletter Update.

Anna Cashman reported that the Fall Newsletter has been published. It was uploaded to the website on Wednesday and a notice to the listserv went out today. An Eblast will go out the first week of December.

Anna Cashman reported that she removed an editorial board member on the RP side for failing to deliver an article two editions in a row. The schedule is set for the remainder of the year, so there is not a need for an immediate replacement. We will look to fill the board in the beginning of next year.

## 12. Mini-CLEs.

Michael Safren reported on the WSBA mini CLE/interactive CLE where the Section may put on a webinar for 2 hours or less. There are two ways to produce a CLE for members:

1. Section is responsible party – designate producer that must physically be at studio to facilitate and guide live production. Section is charged $100. Section can charge attendees for CLE. Possibly offer for no charge. Recording are available for 12 months, but no credits offered (CLE credits only offered if watching live).

2. WSBA is the responsible party. WSBA sets price and WSBA gets all the revenue. WSBA staff will operate as producer but no revenue to Section. A lot less work for Section and no Section funds spent to get it going. May be good for smaller topics.

Jody McCormick reported that many other Sections have enjoyed the Mini CLEs

Heidi Orr commented that the Mini CLEs may be good for newer or younger practitioners, who are good with technology and don't want to attend a live CLE.

Anna Cashman commented that the Mini CLEs, especially if offered at no cost, would be helpful for newer attorneys who cannot afford the expensive live CLEs.

RoseMary Reed commented that the content may want to be tailored for newer practitioners and not upcoming legislative changes that should be part of paid CLEs.

Jody requested each Council to produce their own Mini CLE to test out the tool and gauge interest. Each council will come up with a mini CLE topic, speaker, and producer options. To be decided at next meeting.

## 13. WSBA Licensing Counts.

Jody McCormick reviewed reporting data from WSBA regarding diversity. Jody McCormick commented on the struggle to maintain diversity within the Section when the profession as a whole is not very diverse. Jody McCormick mentioned that the Section does a good job on the diversity we can control: gender, age, small firm/large firm, east/west of state. The issue is the ethnic diversity barrier that is difficult to cross.

Jody McCormick offered to have Robin Nussbaum at the WSBA come back for more diversity training and ask about more action items – how to actually increase diversity instead of just being aware of it.

**14. Scholarship Report.**

Sarah MacLeod gave the Scholarship report. The Section has budgeted $12,850 to offer scholarships to attend the midyear conference. Currently the Open Section Night recipients will receive 2 tuition-only scholarships worth $850. Therefore, there is $12,000 to offer for tuition, lodging, and travel expenses.

Sarah MacLeod reported that the scholarship criteria is to promote diversity – new lawyers, law students, government lawyers, Tribal lawyers, and those whose law firms will not reimburse expenses.

Sarah MacLeod will work on the application process and give it to Julianne Unite for approval at the WSBA. Then the application will be published and disseminated (website, CLEs, newsletter, listserv).

**15. Legislation.**

**a. Real Property**

Annie Fitzsimmons reported that there was nothing to report.

**b. Probate**

RoseMary Reed reported that the only item is the Trust Decanting Statute, which is expected to be supported by the WSBA.

**16. Young Lawyer/Fellows Report.**

As the Young Lawyer just came on board, there is not report from Keaton Hille.

Paul Firuz gave the Fellows Report. The lunchtime mentor/mentee roundtables for December CLEs all set to go. The fellows and the YL will work on getting more visible in law schools and give information about scholarships – all three law schools are represented.

**17. Midyear Meetings.**

**a. 2017 (Walla Walla)**

RoseMary Reed reported that sponsorship materials have gone out and some sponsors have expressed interest. She is currently working on an alcohol sponsor from a winery or family of wineries. Agenda is in the works and speakers are being secured.

**b. 2018 (TBD)**

Annie Fitzsimmons reported that the 2018 Midyear will be June 8-10 at Suncadia.

**18. 2017 Retreat.**

RoseMary Reed reported that the BOG may change fiscal year dates, so she is holding off on scheduling retreat until she finds out more information from today's meeting. May have to hold retreat in October and get off-season rates.

**19. Approval of Expenses.**

All motioned and approved expenses from today's EC meeting.

**20. Adjourn to Council Meetings**

Probate and Trust Council:

Jennifer King reported that the Decanting Bill is moving along. WSBA is recommending sponsoring it.

RoseMary Reed reported that the WSBA Legislation Committee is no longer appointment for life and the WSBA is pushing for term limits.

Currently there is nothing in works for DPA statute fixes.

Please give comments on midyear to RoseMary.

TAB 14

Financial and Section Membership Report

# Washington State Bar Association

Statement of Activities

For the Period from September 1, 2016 to September 30, 2016

**100% OF YEAR COMPLETE**

| | FISCAL 2016 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET |
|---|---|---|---|---|---|
| **REAL PROPERTY, PROBATE AND TRUST LAW SECTION** | | | | | |
| **REVENUE:** | | | | | |
| INTEREST - INVESTMENTS | - | 513.36 | 513.36 | (513.36) | |
| SECTION DUES REVENUE | 58,750.00 | - | 58,712.50 | 37.50 | 99.94% |
| SEMINAR SPLITS W/ CLE | 35,000.00 | 4,813.60 | 43,699.18 | (8,699.18) | 124.85% |
| **TOTAL REVENUE:** | 93,750.00 | 5,326.96 | 102,925.04 | (9,175.04) | 109.79% |
| **DIRECT EXPENSES:** | | | | | |
| CONFERENCE CALLS | 200.00 | - | - | 200.00 | 0.00% |
| PER MEMBER CHARGE | 44,062.50 | - | 44,025.00 | 37.50 | 99.91% |
| LEGISLATIVE/LOBBYING | 500.00 | - | - | 500.00 | 0.00% |
| NEWSLETTER EXPENSES | 3,000.00 | 189.99 | 1,752.49 | 1,247.51 | 58.42% |
| WEBSITE EXPENSES | 5,000.00 | 375.00 | 4,237.50 | 762.50 | 84.75% |
| SEMINAR EXPENSE - SECTIONS | 2,500.00 | - | 11,790.41 | (9,290.41) | 471.62% |
| MEMBERSHIP & RECRUITING EXP | 500.00 | - | 521.16 | (21.16) | 104.23% |
| NEW LAWYER OUTREACH | 500.00 | - | 59.00 | 441.00 | 11.80% |
| SCHOLARSHIPS/DONATIONS/GRANT | 1,500.00 | - | 2,425.00 | (925.00) | 161.67% |
| ATTENDANCE AT BOG MEETINGS | 1,000.00 | - | 607.75 | 392.25 | 60.78% |
| EXECUTIVE COMMITTEE EXPENSES | 10,000.00 | 3,563.25 | 17,883.24 | (7,883.24) | 178.83% |
| EXECUTIVE COMM EXP - OTHER | 5,500.00 | - | 7,624.44 | (2,124.44) | 138.63% |
| LDSHIP/PROF DEVELOP/RETREATS | 22,000.00 | 11,473.76 | 18,191.55 | 3,808.45 | 82.69% |
| SECTION COMMITTEE EXPENSE | 500.00 | - | - | 500.00 | 0.00% |
| **TOTAL DIRECT EXPENSES:** | 96,762.50 | 15,602.00 | 109,117.54 | (12,355.04) | 112.77% |
| **NET INCOME:** | (3,012.50) | (10,275.04) | (6,192.50) | | |
| FUND BALANCE AS OF 9/30/15: | 120,154.08 | | 120,154.08 | | |
| **NEW FUND BALANCE:** | 117,141.58 | | 113,961.58 | | |

**Detail Trial Balance**
Includes Activities from September 1, 2016 to September 30, 2016
Washington State Bar Association



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: 40500** | | **INTEREST - INVESTMENTS** | | | **Beginning Balance** | | | **0.00** |
| 9/30/2016 | GJ21679 | | SRPPT | | Section interest on fund balance for | 513.36 | | |
| 9/30/2016 | GJ21679 | | SRPPT | | Section interest on fund balance for | -513.36 | | |
| 9/30/2016 | GJ21680 | | SRPPT | | Section interest on fund balance for FY | | 513.36 | |
| **Account: 40500** | | **INTEREST - INVESTMENTS** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 0.00 | 513.36 | -513.36 |
| **Account: 40500** | | **INTEREST - INVESTMENTS** | | | **Ending Balance** | | | **-513.36** |
| **Account: 41850** | | **SEMINAR SPLITS W/ CLE** | | | **Beginning Balance** | | | **-38,885.58** |
| 9/30/2016 | GJ21518 | | SRPPT | CS16704CLE | SEMINAR SPLITS W/ CLE | | 4,813.60 | |
| **Account: 41850** | | **SEMINAR SPLITS W/ CLE** | | | **Beginning Balance** | | | **-38,885.58** |
| | | | | | Total Activities | 0.00 | 4,813.60 | -4,813.60 |
| **Account: 41850** | | **SEMINAR SPLITS W/ CLE** | | | **Ending Balance** | | | **-43,699.18** |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Beginning Balance** | | | **-58,712.50** |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Ending Balance** | | | **-58,712.50** |
| **Account: 58150** | | **ATTENDANCE AT BOG MEETINGS** | | | **Beginning Balance** | | | **607.75** |
| **Account: 58150** | | **ATTENDANCE AT BOG MEETINGS** | | | **Ending Balance** | | | **607.75** |

| Posting Date | Document No. | Source No. | DEPT | JOB | Description | Debit Activities | Credit Activities | Balance |
|---|---|---|---|---|---|---|---|---|
| **Account: 58300** | | **EXECUTIVE COMMITTEE** | | | **Beginning Balance** | | | **14,319.99** |
| 9/23/2016 | PI+129013 | V1472 | SRPPT | | RPPT CONF - HOTEL/SARAH | 990.15 | | |
| | | | | | Lane Powell PC | | | |
| 9/23/2016 | PI+129021 | V8023 | SRPPT | | RPPT RETREAT - MILAGE | 189.00 | | |
| | | | | | RoseMary Reed | | | |
| 9/29/2016 | PI+129042 | V8312 | SRPPT | | RPPT RETREAT - MILEAGE | 189.00 | | |
| | | | | | Anna M. Cashman | | | |
| 9/29/2016 | PI+129052 | V8635 | SRPPT | | RPPT EXEC. COMM - MILEAGE | 187.92 | | |
| | | | | | Danielle Flatt | | | |
| 9/29/2016 | PI+129060 | V8603 | SRPPT | | RPPT - EC RETREAT | 216.00 | | |
| | | | | | Jessica C. Allen | | | |
| 9/29/2016 | PI+129084 | V7962 | SRPPT | | RPPT - MILEAGE | 183.60 | | |
| | | | | | Rhys Hefta | | | |
| 9/29/2016 | PI+129088 | V3512 | SRPPT | | RPPT EC RETREAT - MILEAGE | 189.00 | | |
| | | | | | Timothy C Burkart | | | |
| 9/30/2016 | PI+129205 | V6154 | SRPPT | | RPPT - MILEAGE | 231.66 | | |
| | | | | | Brian Lewis | | | |
| 9/30/2016 | PI+129218 | V4637 | SRPPT | | RPPT RETREAT - MILEAGE | 216.00 | | |
| | | | | | Jody M McCormick | | | |
| 9/30/2016 | PI+129239 | V6501 | SRPPT | | RPPT ANNUAL RETREAT - MILEAGE | 213.84 | | |
| | | | | | Nathan G. Smith | | | |
| 9/30/2016 | PI+129251 | V8067 | SRPPT | | RPPT EXEC - MILEAGE | 185.76 | | |
| | | | | | Sherry Bosse Lueders | | | |
| 9/30/2016 | PI+129321 | V7820 | SRPPT | | RPPT RETREAT - MILEAGE | 214.92 | | |
| | | | | | Stephanie R. Taylor | | | |
| 9/30/2016 | PI+129687 | V6128 | SRPPT | | RPPT RETREAT - MILEAGE | 232.20 | | |
| | | | | | Annette Fitzsimmons | | | |
| 9/30/2016 | PI+129692 | V8588 | SRPPT | | RPPT RETREAT - MILEAGE | 124.20 | | |
| | | | | | Clay Gatens | | | |
| **Account: 58300** | | **EXECUTIVE COMMITTEE** | | | **Beginning Balance** | | | **14,319.99** |
| | | | | | Total Activities | 3,563.25 | 0.00 | 3,563.25 |
| **Account: 58300** | | **EXECUTIVE COMMITTEE EXPENSES** | | | **Ending Balance** | | | **17,883.24** |
| **Account: 58305** | | **EXECUTIVE COMM EXP - OTHER** | | | **Beginning Balance** | | | **7,624.44** |
| **Account: 58305** | | **EXECUTIVE COMM EXP - OTHER** | | | **Ending Balance** | | | **7,624.44** |
| **Account: 58325** | | **LDSHIP/PROF** | | | **Beginning Balance** | | | **6,717.79** |
| 9/23/2016 | PI+128954 | V2278 | SRPPT | | RPPT SECTION RETREAT - LODGING | 11,067.85 | | |
| | | | | | Freestone Inn | | | |
| 9/30/2016 | PI+129258 | V4939 | SRPPT | | RPPT RETREAT - BREAKFAST FOR | 405.91 | | |
| | | | | | Washington Trust Bank | | | |

| Posting Date | Document No. | Source No. | DEPT | JOB | Description | Debit Activities | Credit Activities | Balance |
|---|---|---|---|---|---|---|---|---|
| **Account: 58325** | | **LDSHIP/PROF** | | | **Beginning Balance** | | | **6,717.79** |
| | | | | | Total Activities | 11,473.76 | 0.00 | 11,473.76 |
| **Account: 58325** | | **LDSHIP/PROF** | | | **Ending Balance** | | | **18,191.55** |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Beginning Balance** | | | **521.16** |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Ending Balance** | | | **521.16** |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Beginning Balance** | | | **1,562.50** |
| 9/30/2016 | GJ21632 | | SRPPT | | RPPT NWSLTR-Catering - meeting | 189.99 | | |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Beginning Balance** | | | **1,562.50** |
| | | | | | Total Activities | 189.99 | 0.00 | 189.99 |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Ending Balance** | | | **1,752.49** |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Beginning Balance** | | | **44,025.00** |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Ending Balance** | | | **44,025.00** |
| **Account: 58500** | | **NEW LAWYER OUTREACH** | | | **Beginning Balance** | | | **59.00** |
| **Account: 58500** | | **NEW LAWYER OUTREACH** | | | **Ending Balance** | | | **59.00** |
| **Account: 58525** | | **SCHOLARSHIPS/DONATIONS/GRA** | | | **Beginning Balance** | | | **2,425.00** |
| **Account: 58525** | | **SCHOLARSHIPS/DONATIONS/GRA** | | | **Ending Balance** | | | **2,425.00** |
| **Account: 58625** | | **SEMINAR EXPENSE - SECTIONS** | | | **Beginning Balance** | | | **11,790.41** |
| **Account: 58625** | | **SEMINAR EXPENSE - SECTIONS** | | | **Ending Balance** | | | **11,790.41** |
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Beginning Balance** | | | **3,862.50** |
| 9/30/2016 | PI+129122 | V7989 | SRPPT | | RPPT AUGUST WEBSITE MTNCE<br>First Step Internet | 37.50 | | |
| 9/30/2016 | PI+129812 | V7989 | SRPPT | | WSBA RPPT WEBSITE UPDATES<br>First Step Internet | 337.50 | | |

| Posting Date | Document No. | Source No. | DEPT | JOB | Description | Debit Activities | Credit Activities | Balance |
|---|---|---|---|---|---|---|---|---|
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Beginning Balance** | | | **3,862.50** |
| | | | | | Total Activities | 375.00 | 0.00 | 375.00 |
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Ending Balance** | | | **4,237.50** |
| | | | | | Report Total Beginning Balance | | | -4,082.54 |
| | | | | | Report Total Activities | 15,602.00 | 5,326.96 | 10275.04 |
| | | | | | Report Total Ending Balance | | | 6,192.50 |

Organization: WSBA - WSBA - Washington State Bar Association

| Txn Date | GL Txn | Batch | Order No | Invoice | Invoice Dt. | Bill Customer | Txn Type | Txn Function | Account | Amount (dr) | Amount (cr) |
|---|---|---|---|---|---|---|---|---|---|---|---|

Report Total
Net Amount

## Washington State Bar Association

Statement of Activities

For the Period from October 1, 2016 to October 31, 2016

### 8.33% OF YEAR COMPLETE

### REAL PROPERTY, PROBATE & TRUST SECTION

| | FISCAL 2017 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET |
|---|---|---|---|---|---|
| **REVENUE:** | | | | | |
| INTEREST - INVESTMENTS | 200.00 | - | - | 200.00 | 0.00% |
| SECTION DUES REVENUE | 55,000.00 | 2,118.75 | 2,118.75 | 52,881.25 | 3.85% |
| SEMINAR SPLITS W/ CLE | 30,000.00 | - | - | 30,000.00 | 0.00% |
| **TOTAL REVENUE:** | 85,200.00 | 2,118.75 | 2,118.75 | 83,081.25 | 2.49% |
| **DIRECT EXPENSES:** | | | | | |
| CONFERENCE CALLS | 200.00 | - | - | 200.00 | 0.00% |
| PER MEMBER CHARGE | 41,250.00 | 1,612.50 | 1,612.50 | 39,637.50 | 3.91% |
| LEGISLATIVE/LOBBYING | 500.00 | - | - | 500.00 | 0.00% |
| NEWSLETTER EXPENSES | 4,500.00 | - | - | 4,500.00 | 0.00% |
| WEBSITE EXPENSES | 5,000.00 | - | - | 5,000.00 | 0.00% |
| SEMINAR EXPENSE - SECTIONS | 2,500.00 | - | - | 2,500.00 | 0.00% |
| MEMBERSHIP & RECRUITING EXP | 2,500.00 | 50.00 | 50.00 | 2,450.00 | 2.00% |
| NEW LAWYER OUTREACH | 1,350.00 | - | - | 1,350.00 | 0.00% |
| SCHOLARSHIPS/DONATIONS/GRANT | 12,850.00 | - | - | 12,850.00 | 0.00% |
| ATTENDANCE AT BOG MEETINGS | 1,000.00 | - | - | 1,000.00 | 0.00% |
| EXECUTIVE COMMITTEE EXPENSES | 5,500.00 | - | - | 5,500.00 | 0.00% |
| EXECUTIVE COMM EXP - OTHER | 8,000.00 | - | - | 8,000.00 | 0.00% |
| LDSHIP/PROF DEVELOP/RETREATS | 20,000.00 | - | - | 20,000.00 | 0.00% |
| SECTION COMMITTEE EXPENSE | 500.00 | - | - | 500.00 | 0.00% |
| **TOTAL DIRECT EXPENSES:** | 105,650.00 | 1,662.50 | 1,662.50 | 103,987.50 | 1.57% |
| **NET INCOME:** | (20,450.00) | 456.25 | 456.25 | | |
| FUND BALANCE AS OF 9/30/16: | 113,961.58 | | 113,961.58 | | |
| **NEW FUND BALANCE:** | 93,511.58 | | 114,417.83 | | |

**Detail Trial Balance**
Includes Activities from October 1, 2016 to October 31, 2016
Washington State Bar Association



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** | | | **0.00** |
| 10/31/2016 | T10312016 | | SRPPT | | Section Dues Revenue - SRPPT | | 2,118.75 | |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 0.00 | 2,118.75 | -2,118.75 |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Ending Balance** | | | **-2,118.75** |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Beginning Balance** | | | **0.00** |
| 10/20/2016 | GJ21743 | | SRPPT | | Open sections night - Spokane Oct. 20, | 50.00 | | |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 50.00 | 0.00 | 50.00 |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Ending Balance** | | | **50.00** |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Beginning Balance** | | | **0.00** |
| 10/1/2016 | GJ21746 | | SRPPT | | Per member charge - Keaton Hille | 18.75 | | |
| 10/31/2016 | GJ21736 | | SRPPT | | October 2016 Per-Member Charge | 1,593.75 | | |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 1,612.50 | 0.00 | **1,612.50** |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Ending Balance** | | | **1,612.50** |
| | | | | | Report Total Beginning Balance | | | 0.00 |
| | | | | | Report Total Activities | 1,662.50 | 2,118.75 | -456.25 |
| | | | | | Report Total Ending Balance | | | -456.25 |

# Washington State Bar Association

Statement of Activities

For the Period from November 1, 2016 to November 30, 2016

16.67% OF YEAR COMPLETE

| | FISCAL 2017 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET |
|---|---|---|---|---|---|
| **REAL PROPERTY, PROBATE & TRUST SECTION** | | | | | |
| **REVENUE:** | | | | | |
| INTEREST - INVESTMENTS | 200.00 | - | - | 200.00 | 0.00% |
| SECTION DUES REVENUE | 55,000.00 | 7,500.00 | 9,618.75 | 45,381.25 | 17.49% |
| SEMINAR SPLITS W/ CLE | 30,000.00 | - | - | 30,000.00 | 0.00% |
| **TOTAL REVENUE:** | 85,200.00 | 7,500.00 | 9,618.75 | 75,581.25 | 11.29% |
| **DIRECT EXPENSES:** | | | | | |
| CONFERENCE CALLS | 200.00 | - | - | 200.00 | 0.00% |
| PER MEMBER CHARGE | 41,250.00 | 4,743.75 | 6,356.25 | 34,893.75 | 15.41% |
| LEGISLATIVE/LOBBYING | 500.00 | - | - | 500.00 | 0.00% |
| NEWSLETTER EXPENSES | 4,500.00 | 714.99 | 714.99 | 3,785.01 | 15.89% |
| WEBSITE EXPENSES | 5,000.00 | 2,437.50 | 2,437.50 | 2,562.50 | 48.75% |
| SEMINAR EXPENSE - SECTIONS | 2,500.00 | - | - | 2,500.00 | 0.00% |
| MEMBERSHIP & RECRUITING EXP | 2,500.00 | - | 50.00 | 2,450.00 | 2.00% |
| NEW LAWYER OUTREACH | 1,350.00 | - | - | 1,350.00 | 0.00% |
| SCHOLARSHIPS/DONATIONS/GRANT | 12,850.00 | - | - | 12,850.00 | 0.00% |
| ATTENDANCE AT BOG MEETINGS | 1,000.00 | - | - | 1,000.00 | 0.00% |
| EXECUTIVE COMMITTEE EXPENSES | 5,500.00 | 909.57 | 909.57 | 4,590.43 | 16.54% |
| EXECUTIVE COMM EXP - OTHER | 8,000.00 | - | - | 8,000.00 | 0.00% |
| LDSHIP/PROF DEVELOP/RETREATS | 20,000.00 | - | - | 20,000.00 | 0.00% |
| SECTION COMMITTEE EXPENSE | 500.00 | - | - | 500.00 | 0.00% |
| **TOTAL DIRECT EXPENSES:** | 105,650.00 | 8,805.81 | 10,468.31 | 95,181.69 | 9.91% |
| **NET INCOME:** | (20,450.00) | (1,305.81) | (849.56) | | |
| FUND BALANCE AS OF 9/30/16: | 113,961.58 | | 113,961.58 | | |
| **NEW FUND BALANCE:** | 93,511.58 | | 113,112.02 | | |

**Detail Trial Balance**
Includes Activities from November 1, 2016 to November 30, 2016
Washington State Bar Association



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** | | | **-2,118.75** |
| 11/30/2016 | T11302016 | | SRPPT | | Section Dues Revenue - SRPPT | | 7,500.00 | |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Beginning Balance** | | | **-2,118.75** |
| | | | | | Total Activities | 0.00 | 7,500.00 | -7,500.00 |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Ending Balance** | | | **-9,618.75** |
| **Account: 58300** | | **EXECUTIVE COMMITTEE** | | | **Beginning Balance** | | | **0.00** |
| 11/18/2016 | PI+130594 | V4939 | SRPPT | | JM MCCORMIOCK - RPPT - CATERING | 593.57 | | |
| | | | | | Washington Trust Bank | | | |
| 11/30/2016 | PI+130562 | V4637 | SRPPT | | RPPT - MILEAGE | 297.00 | | |
| | | | | | Jody M McCormick | | | |
| 11/30/2016 | PI+130574 | V8477 | SRPPT | | RPPT EXEC - PRKG | 19.00 | | |
| | | | | | Michael Safren | | | |
| **Account: 58300** | | **EXECUTIVE COMMITTEE** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 909.57 | 0.00 | 909.57 |
| **Account: 58300** | | **EXECUTIVE COMMITTEE** | | | **Ending Balance** | | | **909.57** |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Beginning Balance** | | | **50.00** |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Ending Balance** | | | **50.00** |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Beginning Balance** | | | **0.00** |
| 11/1/2016 | GJ21817 | | SRPPT | | RPPT newsletter editorial board lunch | 189.99 | | |
| 11/18/2016 | PI+130304 | V511 | SRPPT | | SECTION NWSLTR - RPPT | 525.00 | | |
| | | | | | Quicksilver | | | |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 714.99 | 0.00 | 714.99 |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Ending Balance** | | | **714.99** |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Beginning Balance** | | | **1,612.50** |
| 11/30/2016 | GJ21761 | | SRPPT | | November 2016 Per-Member Charge | 4,743.75 | | |

| Posting Date | Document No. | Source No. | DEPT | JOB | Description | Debit Activities | Credit Activities | Balance |
|---|---|---|---|---|---|---|---|---|
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Beginning Balance** | | | **1,612.50** |
| | | | | | Total Activities | 4,743.75 | 0.00 | 4,743.75 |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Ending Balance** | | | **6,356.25** |
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Beginning Balance** | | | **0.00** |
| 11/17/2016 | PI+130233 | V7989 | SRPPT | | WEB DESIGN/UPDATES/RPPT<br>First Step Internet | 37.50 | | |
| 11/30/2016 | PI+130450 | V7989 | SRPPT | | RPPT SECTION ANNUAL WEBSITE<br>First Step Internet | 2,400.00 | | |
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 2,437.50 | 0.00 | 2,437.50 |
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Ending Balance** | | | **2,437.50** |
| | | | | | Report Total Beginning Balance | | | -456.25 |
| | | | | | Report Total Activities | 8,805.81 | 7,500.00 | 1305.81 |
| | | | | | Report Total Ending Balance | | | 849.56 |

## Washington State Bar Association

Statement of Activities

For the Period from December 1, 2016 to December 31, 2016

**25.00% OF YEAR COMPLETE**

| | FISCAL 2017 BUDGET | CURRENT MONTH | YEAR TO DATE | REMAINING BALANCE | % USED OF BUDGET |
|---|---|---|---|---|---|
| **REAL PROPERTY, PROBATE & TRUST SECTION** | | | | | |
| **REVENUE:** | | | | | |
| INTEREST - INVESTMENTS | 200.00 | - | - | 200.00 | 0.00% |
| SECTION DUES REVENUE | 55,000.00 | 14,700.00 | 24,318.75 | 30,681.25 | 44.22% |
| SEMINAR SPLITS W/ CLE | 30,000.00 | - | - | 30,000.00 | 0.00% |
| **TOTAL REVENUE:** | 85,200.00 | 14,700.00 | 24,318.75 | 60,881.25 | 28.54% |
| **DIRECT EXPENSES:** | | | | | |
| CONFERENCE CALLS | 200.00 | 36.84 | 36.84 | 163.16 | 18.42% |
| PER MEMBER CHARGE | 41,250.00 | 11,906.25 | 18,262.50 | 22,987.50 | 44.27% |
| LEGISLATIVE/LOBBYING | 500.00 | - | - | 500.00 | 0.00% |
| NEWSLETTER EXPENSES | 4,500.00 | (189.99) | 525.00 | 3,975.00 | 11.67% |
| WEBSITE EXPENSES | 5,000.00 | - | 2,437.50 | 2,562.50 | 48.75% |
| SEMINAR EXPENSE - SECTIONS | 2,500.00 | - | - | 2,500.00 | 0.00% |
| MEMBERSHIP & RECRUITING EXP | 2,500.00 | - | 50.00 | 2,450.00 | 2.00% |
| NEW LAWYER OUTREACH | 1,350.00 | 237.40 | 237.40 | 1,112.60 | 17.59% |
| SCHOLARSHIPS/DONATIONS/GRANT | 12,850.00 | - | - | 12,850.00 | 0.00% |
| ATTENDANCE AT BOG MEETINGS | 1,000.00 | - | - | 1,000.00 | 0.00% |
| EXECUTIVE COMMITTEE EXPENSES | 5,500.00 | - | 909.57 | 4,590.43 | 16.54% |
| EXECUTIVE COMM EXP - OTHER | 8,000.00 | - | - | 8,000.00 | 0.00% |
| LDSHIP/PROF DEVELOP/RETREATS | 20,000.00 | - | - | 20,000.00 | 0.00% |
| SECTION COMMITTEE EXPENSE | 500.00 | - | - | 500.00 | 0.00% |
| **TOTAL DIRECT EXPENSES:** | 105,650.00 | 11,990.50 | 22,458.81 | 83,191.19 | 21.26% |
| **NET INCOME:** | (20,450.00) | 2,709.50 | 1,859.94 | | |
| FUND BALANCE AS OF 9/30/16: | 113,961.58 | | 113,961.58 | | |
| **NEW FUND BALANCE:** | 93,511.58 | | 115,821.52 | | |

**Detail Trial Balance**
Includes Activities from December 1, 2016 to December 31, 2016
Washington State Bar Association



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** | | | **-9,618.75** |
| 12/31/2016 | T12312016 | | SRPPT | | Section Dues Revenue - SRPPT | | 14,700.00 | |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Beginning Balance** | | | **-9,618.75** |
| | | | | | Total Activities | 0.00 | 14,700.00 | -14,700.00 |
| **Account: 48200** | | **SECTION DUES REVENUE** | | | **Ending Balance** | | | **-24,318.75** |
| **Account: 50165** | | **CONFERENCE CALLS** | | | **Beginning Balance** | | | **0.00** |
| 12/15/2016 | PI+130850 | V5611 | SRPPT | | ACCT # 012742/NOV 2016 CONF. Quickconnect.com | 36.84 | | |
| **Account: 50165** | | **CONFERENCE CALLS** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 36.84 | 0.00 | 36.84 |
| **Account: 50165** | | **CONFERENCE CALLS** | | | **Ending Balance** | | | **36.84** |
| **Account: 58300** | | **EXECUTIVE COMMITTEE** | | | **Beginning Balance** | | | **909.57** |
| **Account: 58300** | | **EXECUTIVE COMMITTEE** | | | **Ending Balance** | | | **909.57** |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Beginning Balance** | | | **50.00** |
| **Account: 58350** | | **MEMBERSHIP & RECRUITING EXP** | | | **Ending Balance** | | | **50.00** |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Beginning Balance** | | | **714.99** |
| 12/1/2016 | GJ21926 | | SRPPT | | To reverse GJ21817 - posted twice | | 189.99 | |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Beginning Balance** | | | **714.99** |
| | | | | | Total Activities | 0.00 | 189.99 | -189.99 |
| **Account: 58375** | | **NEWSLETTER/PUBLICATION** | | | **Ending Balance** | | | **525.00** |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Beginning Balance** | | | **6,356.25** |
| 12/31/2016 | GJ22007 | | SRPPT | | December 2016 Per-Member Charge | 11,025.00 | | |
| 12/31/2016 | GJ22027 | | SRPPT | | November 2016 per member charge | 881.25 | | |

| Posting Date | Document No. | Source No. | DEPT | JOB | Description | Debit Activities | Credit Activities | Balance |
|---|---|---|---|---|---|---|---|---|
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Beginning Balance** | | | **6,356.25** |
| | | | | | Total Activities | 11,906.25 | 0.00 | 11,906.25 |
| **Account: 58400** | | **PER MEMBER CHARGE** | | | **Ending Balance** | | | **18,262.50** |
| **Account: 58500** | | **NEW LAWYER OUTREACH** | | | **Beginning Balance** | | | **0.00** |
| 12/21/2016 | PI+130930 | V73 | SRPPT | | CATERING - RPPT MENTORSHIP<br>Ingallina's Box Lunch Inc | 145.66 | | |
| 12/21/2016 | PI+130931 | V73 | SRPPT | | CATERING - RPPT MENTORSHIP<br>Ingallina's Box Lunch Inc | 76.45 | | |
| 12/21/2016 | PI+130932 | V73 | SRPPT | | CATERING - RPPT MENTORSHIP<br>Ingallina's Box Lunch Inc | 15.29 | | |
| **Account: 58500** | | **NEW LAWYER OUTREACH** | | | **Beginning Balance** | | | **0.00** |
| | | | | | Total Activities | 237.40 | 0.00 | 237.40 |
| **Account: 58500** | | **NEW LAWYER OUTREACH** | | | **Ending Balance** | | | **237.40** |
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Beginning Balance** | | | **2,437.50** |
| **Account: 58675** | | **WEBSITE EXPENSES** | | | **Ending Balance** | | | **2,437.50** |
| | | | | | Report Total Beginning Balance | | | 849.56 |
| | | | | | Report Total Activities | 12,180.49 | 14,889.99 | -2709.50 |
| | | | | | Report Total Ending Balance | | | -1,859.94 |

TAB 15

Website and Technology Update

Material forthcoming

TAB 16

Upcoming BOG Meetings

## 2016-2017 Board Meetings

**March 9-10** | Red Lion, Olympia, WA
Materials deadline: Feb. 22

**May 18-19** | WSBA, Seattle, webcast
Materials deadline: May 3

**July 28-29** | Alderbrook, Union, WA
Materials deadline: July 12

**Sept. 28-29** | WSBA , Seattle, webcast
Materials deadline: Sept. 13

TAB 17

Scholarship Report

**WSBA REAL PROPERTY PROBATE AND TRUST SECTION**
**FOR 2017 MID-YEAR CONFERENCE**

The Real Property, Probate and Trust Section would like to set aside $10,000 to create a scholarship to allow law students, new and young attorneys, and attorneys working for governments, tribes or non-profit organizations to become involved with the RPPT Section. The Section would like to off the scholarship to cover the costs of tuition, travel, room and board for the Section's annual Mid-Year Conference held in June, in order that eligible applicants who are interested in becoming more involved in the Section, and who may not otherwise be able to attend the Mid-Year Conference may attend this year's Mid-Year Conference.

Below is full description of the proposed scholarship and application process:

**Purpose**
In order to encourage law students, new and young attorneys, and attorneys working for governments, tribes or non-profit organizations to become more involved with the RPPT Section, the Section is making a limited number of scholarships available to cover a portion of the costs of attending the Mid-Year Conference. Conference tuition is paid directly to WSBA, and remaining funds will be made available to reimburse the recipient for out-of-pocket expenses such as room and travel costs. Scholarship recipients will receive an expense report form for use in requesting reimbursement that will be paid from Section funds.

**Application Process**
To be considered for selection, applicants must submit the attached application to the Chair of the RPPT Section along with a brief description of 1.) How the applicant meets the selection criteria, 2.) Why the applicant wishes to attend the Mid-Year Conference, and 3.) A brief statement indicating the applicant's desire to become more involved with the Real Property Probate and Trust Section.

**Selection Criteria**
Individuals eligible for the scholarship must meet the following criteria:

1. Eligibility. The individual must be:

   A. An attorney who has been a member of the Bar of any state for 5 years or less;

   B. A student pursuing a JD or tax LLM who demonstrates a strong interest in pursuing a career in the practice of real property, probate and trust law; or

   C. An attorney employed by a governmental unit, non-profit organization or Indian Tribe.

2. Member of RPPT Section. An attorney or student who is a member of the RPPT Section, or joins the RPPT Section at the time of application.

3. Financial Need. An attorney or student whose employer does not reimburse for the cost of attending CLEs. If the employer has a policy of paying a percentage of the registration fee, the attorney may be eligible for a partial scholarship for the balance of the Mid-Year tuition and/or travel expenses.

Current members of the Real Property Probate and Trust Section Executive Committee are not eligible for the scholarship.

**Selection Process**
Applicants who meet the above criteria will be selected by the Chair of the RPPT Section Executive Committee on a first-come-first-served basis after the deadline for applications has passed.

**Marketing**
The Section will publicize the scholarship in the following ways:

- An announcement made at both the Real Property and Probate and Trust Spring CLEs;
- The RPPT Section Website and Listserve;
- The RPPT Young Lawyers Section liaison will work with WYLD Section to publish announcement among its members; and
- The RPPT Fellows will contact Real Property, Probate and Trust professors at University of Washington, Seattle University and Gonzaga to announce scholarship.

**REAL PROPERTY PROBATE AND TRUST SECTION**
**SCHOLARSHIP FOR**
**2017 MID-YEAR CONFERENCE**
***JUNE 9-11, MARCUS WHITMAN HOTEL, WALLA WALLA***

**APPLICANT INFORMATION**

Name: ______________________________________________

Firm/Company: ______________________________________________

Address: ______________________________________________

City, State, Zip: ______________________________________________

Email: ______________________________________________

Phone: ______________________________________________

Please list WSBA No. ___________________

RPPT Member? ______Yes ______No

I practice Real Property______I practice Probate & Trust______I practice in both areas _____

Please provide a brief description of the following:

1) How you meet the selection criteria listed below;
2) Why you wish to attend the Mid-Year Conference; and
3) A brief statement indicating your desire to become more involved with the Real Property Probate and Trust Section.

**Selection Criteria**
Individuals eligible for the scholarship must meet the following criteria:

1. Eligibility. The individual must be:

   A. An attorney who has been a member of the Bar of any state for 5 years or less;

B. A student pursuing a JD or tax LLM who demonstrates a strong interest in pursuing a career in the practice of real property, probate and trust law; or

C. An attorney employed by a governmental unit, non-profit organization or Indian Tribe.

2. Member of RPPT Section. An attorney or student who is a member of the RPPT Section, or joins the RPPT Section at the time of application.

3. Financial Need. An attorney or student whose employer does not reimburse for the cost of attending CLEs. If the employer has a policy of paying a percentage of the registration fee, the attorney may be eligible for a partial scholarship for the balance of the Mid-Year tuition and/or travel expenses.

Current members of the Real Property Probate and Trust Section Executive Committee are not eligible for the scholarship.

To be eligible for consideration, applications must be received by email to Sarah Macleod at macleods@lanepowell.com, in a PDF or Word format. Please be sure to include this applicant information page, your responses to the questions on the following page, and a copy of your current resume.

**Deadline: Applications are due no later than March 31, 2017.**

Scholarship winners will be notified by mid-April 2017. If you have any questions, please feel free to contact Sarah MacLeod at 206.223.7721 or via email at macleods@lanepowell.com.

TAB 18

Fellow Applications

## APPLICANT INFORMATION

Name: Patrick Edward Byrnes

Firm/Company: Williams Kastner & Gibbs PLLC

Address: 601 Union Street, Suite 4100, Seattle, WA 98101

Email: pbyrnes@williamskastner.com

Phone: 206-628-6635

WSBA No: 45467

RPPT Member? Yes

My practice includes trust and estate litigation.

## LEADERSHIP DEVELOPMENT INITIATE PROGRAM
## WSBA REAL PROPERTY, PROBATE & TRUST SECTION
## APPLICATION

1. Briefly state why you are interested in being appointed a Fellow to the Section.

As a fifth-year associate, I am interested in exploring opportunities for professional development and networking in order to become more involved in the Seattle professional and legal community, particularly regarding trusts and estates. After law school, I started at a small firm in Seattle and worked there for approximately two and a half years before joining Williams Kastner & Gibbs PLLC in 2015. Almost immediately upon starting at Williams Kastner, I began working with Stan Foster on TEDRA matters. I found the work to be interesting and challenging and enjoyed representing individual clients regarding their personal estate matters. I spoke with Stan about getting more involved in the trusts and estates legal community, and he pointed me to the WSBA Real Property, Probate and Trust section as an excellent means for broadening the depth of my practice in this area, contributing to the legal community by assisting the Legislature in drafting laws affecting this practice area, and helping to educate lawyers through the RPPT newsletter, CLEs, and other events.

2. Describe the nature of your law practice or professional position, with particular attention to the substantive areas of law in which you are currently involved.

I am an associate attorney practicing commercial litigation. My work includes a variety of practice areas, such as products liability, bankruptcy, breach of contract, tort actions, and TEDRA matters. I have had substantial experience in a number of TEDRA matters working alongside Stan Foster at my firm. My work in this area has allowed me to gain a familiarity with the provisions of TEDRA and an appreciation for litigating under its unique statutory framework. Further, my general litigation work, including my bankruptcy work (in which we generally represent Chapter 7 trustees) has given me experience in litigating breach of fiduciary duty and trust matters.

3. Describe your activities (if any) within the WSBA Young Lawyers Committee, in another Section of the WSBA, in your local or state bar organization, or in a Minority Bar Association. Please include all programs and activities for which you have significant or primary responsibility. Highlight not only participation in substantive programs but also those that would provide opportunities for you to recruit members for the RPPT Section.

As a young associate, I was focused on learning the law and making sure I did the best possible work at my firm. Therefore, I have not had much engagement with the WSBA up to this point in my career. However, having practiced for a few years, I feel increasingly comfortable at my job and am ready to expand my professional role to include involvement in professional networking groups and in bar and community organizations. With this goal in mind, I joined the RPPT WSBA Section and the WSBA Creditor/Debtor Section in 2016. I am also involved with the Seattle Chamber of Commerce, including attending events sponsored by their Young Professionals Network, and have attended a number of informational and networking events sponsored by the Washington Business Alliance. Finally, I am considering joining the Seattle Rotary Club. I believe that any of these organizations may potentially allow me to recruit members to the RPPT Section. Further, my own firm has a number of young associates whom I could potentially recruit to the section. Therefore, I should have a number of opportunities to recruit new members.

4. Identify any activities or programs that you would recommend to increase: (a) positive interaction between the WSBA's Young Lawyers Committee and the Section; and (b) active young lawyer membership in the Section (outside of a YLC context).

If appointed a fellow, I would reach out to members of YLC in an effort to increase interaction between RPPT and YLC. My firm is able to host or organize mixers or other events that members of both organizations could attend, such as lunch talks, CLEs, or happy hours. Williams Kastner's marketing director, Christopher Welch, does an excellent job helping attorneys to plan, advertise, and execute such events. Outside of the YLC context, the section could put on events specifically geared towards young attorneys in an effort to increase young lawyer membership, such as CLEs discussing TEDRA/probate essentials or social/networking events. One particular idea is visiting the University of Washington and Seattle University law schools and meeting with students interested in trusts and estates work. This could take the form of a brief presentation to the students in a trust and estates class on the RPPT and its work, or a booth or table hosted at the schools.

5. Describe any obstacles you might face that would potentially prohibit your full participation in this program.

None.

6. Would you be interested in serving on a substantive RPPT committee (legislation or continuing legal education)? If "yes," which committee?

I would be interested in serving on either committee although my preference would be the legislation committee.

# PATRICK E. BYRNES

**1623 Bellevue Avenue, Apt. 402, Seattle, WA 98122 • byrnespb@gmail.com • 425.299.2908**

## EDUCATION

**University of California, Berkeley, School of Law**, Berkeley, CA
J.D., May 2012
Activities: Extern with the U.S. Securities and Exchange Commission, San Francisco Regional Office, Spring 2012; Law Clerk at Taylor & Company, LLP, Spring 2012; Clinical Intern with the East Bay Community Law Center (Housing Litigation), Fall 2011; Research Assistant (Evidence); Note-taker for the Disabled Students Program.

**Brooklyn Law School**, Brooklyn, NY
Class Rank: Top 5%
Activities: Health Law and Policy Association; International Law Society Newsletter Co-Editor.

**Boston College**, Chestnut Hill, MA
B.A., Political Science, May 2009
Honors: Arts and Sciences Honors Program; Dean's List (2005 - 2009).
Honors Paper: Ethical Issues in Pediatric Heart Transplantation After Cardiac Death.
Study Abroad: Institute for the International Education of Students, Barcelona, Spain (Spring 2008).

## EXPERIENCE

**Williams, Kastner & Gibbs, PLLC**, Seattle, WA 2015-Present
Work as a litigation associate focusing on bankruptcy litigation, products liability, intellectual property, insurance coverage, trusts and estates litigation, and appellate advocacy. Assist clients ranging from individuals to large international corporations in state and federal court and in arbitrations and mediations. Additionally, serve as a member of the firm's Pro Bono Committee.

**Young deNormandie, P.C.**, Seattle, WA
*Associate* 2012-2015
Worked as a commercial litigation associate conducting legal research, drafting pleadings, conducting discovery, attending mediations and arbitrations, and appearing in court.

**Washington State Office of the Attorney General**, Bellingham, WA
*Law Clerk* Summer 2011
Worked as a Rule 9 Intern appearing in court on behalf of the State in civil and administrative proceedings. Drafted briefs, motions, and informal client advice memoranda. Prepared social workers to give testimony in child dependency proceedings. Argued a motion in front of a judge. Reviewed and discussed case files with Assistant Attorneys General.

## ADDITIONAL INFORMATION

Currently volunteer as a pro bono attorney for the Northwest Immigrant Rights Project.
Placed 2$^{nd}$ overall in intramural tennis at Berkeley in Spring 2011.
Ran the Seattle Half Marathon in November 2009, the Skagit Flats Half Marathon in September 2012, and the Bellingham Bay Half Marathon in 2016.

**LEADERSHIP DEVELOPMENT INITIATIVE PROGRAM**
**WSBA REAL PROPERTY, PROBATE & TRUST SECTION**
**APPLICATION**

**APPLICANT INFORMATION**

Name: Thomas A. Hackett

Firm/Company: NW Legacy Law Center, P.S.

Address: 1351 Officers Row

City, State, Zip: Vancouver, WA 98661

Email: thomas@nwlegacylaw.com

Phone: 360-975-7770

Please list WSBA No. 43984

RPPT Member? X Yes ______ No

I practice Real Property _____ I practice Probate & Trust X I practice in both areas _____

To be eligible for consideration, applications must be received by email to Jody McCormick at jmccormick@watrust.com, in a PDF or Word format. Please be sure to include this applicant information page, your responses to the questions on the following page, and a copy of your current resume.

**Applications are due no later than January 31, 2017.**

Fellows will be notified of their appointment by mid-April 2017. If you have any questions, please feel free to contact the RPPT Chair, Jody McCormick, at 509-354-1048 or via email at jmccormick@watrust.com.

**LEADERSHIP DEVELOPMENT INITIATIVE PROGRAM**
**WSBA Real Property, Probate & Trust Section**
**Application for THOMAS A. HACKETT**

1. **Briefly state why you are interested in being appointed as a Fellow to the Section.**

   As the sole attorney in my law firm, NW Legacy Law Center, P.S., which includes a staff of three paraprofessionals and a client services coordinator, it would be beneficial to be actively involved with other attorneys practicing in the same fields of law. This opportunity would be beneficial to me both personally and professionally and would allow me to share my combined experience of working for both large and small law firms as well as my experience in having set up my own law firm three years ago.

2. **Describe the nature of your law practice or professional position, with particular attention to the substantive areas of law in which you are currently involved.**

   Currently NW Legacy Law Center assists clients with:
   - Estate planning including basic and advanced taxable and nontaxable estate plans, family limited liability companies and trusts to hold real property and other assets, and long term care planning and guardianships;
   - Estate and trust administration including advising fiduciaries and beneficiaries; and
   - Business planning including entity selection, formation, tax strategies, contracts, leases, real property purchases and sales, conversions, business acquisitions, and sales transactions.

3. **Describe your activities (if any) within the WSBA Young Lawyers Committee, in another Section of the WSBA, in your local or state bar organization, or in a Minority Bar Association. Please include all programs and activities for which you have primary or significant responsibility. Highlight not only participation in substantive programs but also those that would provide opportunities for you to recruit members for the RPPT Section.**

   I am an active member within Wealth Counsel and Elder Counsel. I have also volunteered with Mock Trials for middle school students. I am a member of the Young Lawyers Section of Clark County Bar Association with active attendance at selected meetings and a member of New Tax Lawyer Section of the Oregon Bar Association. My established interaction with other young lawyers in both Southwest Washington and the Portland area provides me with integral recruiting opportunities

4. **Identify any activities or programs that you would recommend to increase: (a) positive interaction between the WSBA's Young Lawyers Committee and the Section; and (b) active young lawyer membership in the Section (outside of a YLC context).**

   I would work to implement case study continuing legal education opportunities that would include the presentation of different fact patterns by lawyers together with interactive discussions of various approaches to handling those situations. These CLEs would target more beginning to intermediate level problems which I believe is what most practitioners encounter – a focus on what practitioners do 80% of the time, not the specialized situations that are encountered infrequently.

5. **Describe any obstacles you might face that would potentially prohibit your full participation in this program.**

   I am responsible for the operation of my law firm, however I have excellent support staff who will assist me with scheduling obligations. I am also married and an active father of two children.

6. **Would you be interested in serving on a substantive RPPT committee (legislation or continuing legal education)? If "yes," which committee?**

   Yes, I would be interested in serving on the continuing legal education committee.

# THOMAS A. HACKETT

6904 NW Dogwood Dr ~ Vancouver, WA 98663
(360) 909-4162 ~ thomas@nwlegacylaw.com

## EXPERIENCE

NW LEGACY LAW CENTER, P.S., Vancouver, Washington — 2014 - Present
***Business and Estate Planning Attorney/Owner***
**Estate Planning**: prepare and implement basic and advanced taxable and nontaxable estate plans, including family limited liability companies and trusts to hold real property and other assets for younger generations. Assist clients on funding of trusts. Assist clients with long term care planning and guardianships.
**Estate and Trust Administration**: advise fiduciaries and beneficiaries in the administration of taxable and non-taxable estates and trusts in Washington and Oregon.
**Business Planning**: advise Washington and Oregon business owners as outside general counsel with entity selection, formation, tax strategies, contracts, leases, real property purchases and sales, conversions, and business acquisitions and sales transactions.

SUSSMAN SHANK LLP, Portland, Oregon — 2013 - 2014
***Estate Planning Attorney***
**Estate Planning**: drafted and implemented taxable and nontaxable estate plans, including family limited liability companies and trusts to hold assets for younger generations.
**Estate and Trust Administration**: advise fiduciaries and beneficiaries in the administration of taxable and non-taxable estates.

HORENSTEIN LAW GROUP PLLC, Vancouver, Washington — 2012 - 2013
***Business and Estate Planning Attorney***
**Estate Planning**: lead attorney in drafting and implementing taxable and nontaxable estate plans, including family limited liability companies and trusts to hold assets for younger generations.
**Estate and Trust Administration**: advised fiduciaries and beneficiaries in the administration of taxable and non-taxable estates.
**Business Planning**: advised business owners as outside general counsel with entity selection, employment matters, multi-entity planning, and the sale and purchase of businesses.

HS LAW FIRM, P.C. (FORMERLY HANNA STRADER, P.C.), Portland, Oregon — 2010 - 2011
***Tax Attorney***
**Estate Planning**: planned taxable and nontaxable estates, including wills, revocable trusts, power of attorneys, and related special-purpose entities.
**Business Planning**: prepared advice for business owners regarding tax and non-tax considerations, including structuring, restructuring, entity conversion, business relocation, multi-entity planning, and retirement benefit planning.
**Estate and Trust Administration**: prepared advice for fiduciaries and beneficiaries in trust and estate administrations, including Federal Estate Tax Returns and Oregon Inheritance Tax Returns.

DAVIS WRIGHT TREMAINE LLP, Portland, Oregon — 2009
***Summer Law Clerk***

WASHINGTON STATE SUPREME COURT, Justice R. Sanders, Olympia, Washington — 2008
***Summer Extern***

SMALL BUSINESS LEGAL CLINIC, Lewis & Clark Law School, Portland, Oregon — 2007
***Volunteer Law Clerk***

MT. HOOD MEADOWS SKI RESORT, Mt. Hood, Oregon — 2006 - 2007
***Ski Instructor/Adaptive Skiing Specialist***

## EDUCATION

UNIVERSITY OF WASHINGTON LAW SCHOOL, Seattle, Washington — Fall 2009
***Juris Doctor, honors, emphasis in tax***
GPA 3.68/4.00; top 20% of class; Completed program in 2 years.
Completed majority of Tax LLM courses as a JD student.
*Honors and Activities:* Article Editor, Shidler Journal; Robert Dodge Scholar.

SEATTLE UNIVERSITY, Seattle, Washington — 2003
***Bachelor of Arts in Economics, magna cum laude***
*Honors and Activities:* President's List; Vice President for Finance of Student Union.

LONDON SCHOOL OF ECONOMICS, London, England — 2002
***Summer Program***

## ACTIVITIES/INTERESTS

Current board member for JDRF Oregon/SW Washington Chapter. Former President of the Vancouver Farmers Market Association (2014-2016). Kite Boarding, skiing, biking, running, and adventure racing; married father of two great children.

**LEADERSHIP DEVELOPMENT INITIATIVE PROGRAM**
**WSBA REAL PROPERTY, PROBATE & TRUST SECTION**
**APPLICATION**

**APPLICANT INFORMATION**

Name: Brian Jeffrey Hansford

Firm/Company: Campbell, Dille, Barnett & Smith, PLLC

Address: 317 South Meridian

City, State, Zip: Puyallup, WA 98371

Email: bhansford@cdb-law.com

Phone: 253-848-3513

Please list WSBA No. 47380

RPPT Member? ✓ Yes ______ No

I practice Real Property _____ I practice Probate & Trust _____ I practice in both areas ✓

To be eligible for consideration, applications must be received by email to Jody McCormick at jmccormick@watrust.com, in a PDF or Word format. Please be sure to include this applicant information page, your responses to the questions on the following page, and a copy of your current resume.

**Applications are due no later than January 31, 2017.**

Fellows will be notified of their appointment by mid-April 2017. If you have any questions, please feel free to contact the RPPT Chair, Jody McCormick, at 509-354-1048 or via email at jmccormick@watrust.com.

Brian Hansford

**LEADERSHIP DEVELOPMENT INITIATIVE PROGRAM**
**WSBA REAL PROPERTY, PROBATE & TRUST SECTION**
**APPLICATION**

**APPLICANT INFORMATION**

Name: Jamie R. Lanier

Firm/Company: Lane Powell PC

Address: 1420 5th Avenue, Suite 4200, Seattle, Washington 98101

Email: lanierj@lanepowell.com

Phone: (206) 223-7716

Please list WSBA No.: 46577

RPPT Member? X Yes ___ No

I practice Real Property ___ I practice Probate and Trust X I practice in both areas ___

To be eligible for consideration, application must be received by email to Jody McCormick at jmccormick@watrust.com, in PDF or Word format. Please be sure to include this applicant information page, your responses to the questions on the following page, and a copy of your current resume.

**Applications are due no later than January 31, 2017.**

Fellows will be notified of their appointment by mid-April 2017. If you have any questions, please feel free to contact the RPPT Chair, Jody McCormick, at 509-354-1048 or via email at jmccormick@watrust.com.

**LEADERSHIP DEVELOPMENT INITIATIVE PROGRAM**
**WSBA REAL PROPERTY, PROBATE & TRUST SECTION**
**APPLICATION**

1. I am fairly new to the estate planning practice and, as a result, I feel like more of a bystander than an active participant in Seattle's estate planning community. I am interested in becoming a Fellow because I want to become more actively involved in that community. As a Fellow, I hope to lay the groundwork to eventually take on a leadership role in the Section and to encourage other new attorneys to get more involved in the Section.

2. I am a member of Lane Powell's Trusts and Estates Practice Group. In that capacity, I work with individuals and families to help them achieve their estate and personal planning goals. Specifically, I focus my practice on gift and estate tax issues and trust and estate administration. I also have experience advising nonprofit organizations with respect to formation and compliance issues.

3. I am a member of the King County Bar Association and the Real Property Probate and Trust Section and Taxation Section of the Washington State Bar Association. In August, 2016, I was a co-presenter of "Recent Changes in Estate Planning," Washington State Bar Association Readmission Course. I will be presenting at the March 2017 Washington State Bar Association Readmission Course as well. In addition, I am co-authoring an article on Washington's new Uniform Power of Attorney Act for the Real Property Probate and Trust newsletter.

4. I think it would be great if the Section focused on educating law students about what opportunities exist to get involved with the Section. A lot of students want to participate but don't know where to start. If we bring them in as students, when they may have more spare time and incentive to attend Section events, then they may be more likely to continue to stay involved in the Section after they start practicing. Accordingly, I think it would be useful to send a Fellow or other representative to Seattle University and the University of Washington to meet with law students (particularly LL.M. students) in order to educate them and encourage them to get involved in the Section.

5. I have a very busy practice at Lane Powell so it will be difficult balancing my work load and the Leadership Development Initiative Program. However, I am lucky to work for a Firm that values and encourages its associates to get out into the community and become actively involved in groups such as this one. I know that I will have Lane Powell's full support in this endeavor.

6. I would be interested in participating in the continuing legal education committee.

**JAMIE RANDALL LANIER**
**910 Lenora Street #1010, Seattle, Washington 98121**
**(509) 954-7716 jserandall@gmail.com**

---

## BAR ADMISSION

Admitted to practice in Washington State (2013)

## EDUCATION

***University of Washington School of Law***: LL.M. in Taxation (2016), 3.7 GPA

- CALI Excellence for the Future Award: Estate Planning and Compensation & Benefits I
- ETHICAL DUTIES TO THE TAX SYSTEM: A HANDBOOK, Schumacher and Hatfield, eds. (University of Washington School of Law 2015), Assistant Editor

***Seattle University School of Law***: J.D. (2013), *Magna Cum Laude*, 3.6 GPA (Top 15%)

- CALI Excellence for the Future Award: Trusts and Estates

***Seattle University***: B.A. in Communication Studies (2008), *Cum Laude*

## PUBLICATIONS

- "New Uniform Power of Attorney Act, Effective January 1 (Bankers' Edition)," Lane Powell Legal Update, Co-author (December 1, 2016)
- "Private Foundations: Taking Them Beyond Checkbook Philanthropy," *Seattle Business* magazine, Co-author (November 2016)
- "New Uniform Power of Attorney Act, Effective January 1," Lane Powell Legal Update, Co-author (October 5, 2016)

## SPEAKING ENGAGEMENTS

- Recent Changes in Estate Planning," Washington State Bar Association Readmission Course, Co-presenter (August 25-26, 2016)

## PROFESSIONAL ACTIVITIES

- Member, King County Bar Association
- Washington State Bar Association
  - Member, Real Property Probate and Trust Section
  - Member, Taxation Section
- Volunteer, Washington First Responder Will Clinic
- Volunteer, Fred Hutchinson Cancer Research Center
- Member, Junior League of Seattle

## WORK EXPERIENCE

**Lane Powell, PC**

Attorney, Trusts and Estates Group (2015 to present)

- Prepare estate planning documents and advise clients with respect to gift and estate tax issues.
- Trust and estate administration.
- Advise nonprofit organizations with respect to formation and compliance issues.

**U.S. Bankruptcy Court for the Western District of Washington**
Law Clerk to the Honorable Marc Barreca (2013 -2015)
Judicial Extern to the Honorable Marc Barreca (January – May 2013)

- Perform legal research and analysis for weekly motions calendars, evidentiary hearings, and related adversary proceedings.
- Compose rulings following evidentiary hearings and trials.

**Mercado & Hartung, PLLC**
Law Clerk (April – September 2012)

- Prepared individual bankruptcy petitions and represented clients at 11 U.S.C. S341 creditor meetings pursuant to Rule 9 limited admission.
- Conducted legal research, analysis, and writing, regarding various real estate, bankruptcy, criminal defense, and commercial matters.
- Prepared motions, discovery requests and responses, demand letters, and supporting documents related to various real estate, bankruptcy, criminal defense, and commercial matters.
- Primarily responsible for facilitating and negotiating over thirty short sale real estate transactions.

**Washington State Attorney General's Office**
Law Clerk, Consumer Protection Division (May – August 2011)

- Investigated allegations and supporting evidence in consumer protection actions under R.C.W. 19.86.
- Conducted legal research, analysis, and writing, regarding fraud, unfair competition, and false advertising claims. Prepared interrogatory answers and objections related to the same.
- Drafted legal memoranda on attorney misconduct and corresponding sanctions.

**LEADERSHIP DEVELOPMENT INITIATIVE PROGRAM**
**WSBA REAL PROPERTY, PROBATE & TRUST SECTION**
**APPLICATION**

**APPLICANT INFORMATION**

Name: Sharon C. Rutberg

Firm/Company: Law Office of Sharon C. Rutberg, PS

Address: 1734 NW Market Street

City, State, Zip: Seattle, WA 98107

Email: email@sharonrutberglaw.com

Phone: 206-409-2604

Please list WSBA No.: 47055

RPPT Member? Yes

I practice Real Property _____ I practice Probate & Trust _____ I practice in both areas __XX__

To be eligible for consideration, applications must be received by email to Jody McCormick at jmccormick@watrust.com, in a PDF or Word format. Please be sure to include this applicant information page, your responses to the questions on the following page, and a copy of your current resume.

**Applications are due no later than January 31, 2017.**

Fellows will be notified of their appointment by mid-April 2017. If you have any questions, please feel free to contact the RPPT Chair, Jody McCormick, at 509-354-1048 or via email at jmccormick@watrust.com.

**1. Briefly state why you are interested in being appointed as a Fellow to the Section.**

I am a former corporate and government lawyer who stepped away for some years and returned to practice in 2014, when I joined the Washington Bar. I have operated a successful solo estate planning and probate practice for three years now, with the help of WSBA resources, CLE courses, and informal mentors and advisors. I am excited about the prospect of developing a deeper knowledge of my practice areas through the mentorship opportunities the Fellows Program offers. I would enjoy writing for the RPPT newsletter and participating in section CLE sessions. I have held leadership roles in various organizations over the years, and I relish the opportunity to form new relationships with fellow estate and probate attorneys, enhance my practice, and serve the Washington legal community.

**2. Describe the nature of your law practice or professional position, with particular attention to the substantive areas of law in which you are currently involved.**

The sole focus of my practice is estate planning and probate. Over the past three years, I have prepared estate planning documents for a wide range of clients. My clients tend to be individuals and couples whose asset levels put them near or below the Washington state exemption level for estate taxes (with the help of credit shelter trusts). My clients range in age from young couples with a baby (or one on the way) to senior citizens. I have also taken on some probate work and look forward to further developing that area of my practice.

**3. Describe your activities (if any) within the WSBA Young Lawyers Committee, in another Section of the WSBA, in your local or state bar organization, or in a Minority Bar Association. Please include all programs and activities for which you have primary or significant responsibility. Highlight not only participation in substantive programs but also those that would provide opportunities for you to recruit members for the RPPT Section.**

I am a member of the King County Bar Association and its RPPT section. I attend RPPT section meetings from time to time and would be willing to step up my participation. This year, I joined NAELA and WAELA to better serve my senior clientele, and hope to become more active in those organizations as well.

**4. Identify any activities or programs that you would recommend to increase: (a) positive interaction between the WSBA's Young Lawyers Committee and the Section; and (b) active young lawyer membership in the Section (outside of a YLC context).**

Although I am new to the Washington bar, I am not "young," and so I have not taken advantage of the Young Lawyers activities. It would, however, be interesting to think about ways to attract younger lawyers to the practice of estate, trust, probate, and real estate law. These practice areas might appeal to younger lawyers because they allow a lawyer to serve individuals in need, across a wide spectrum of age and income groups, and because they can be a good way to get started in solo practice, given the right resources. With the challenges of finding work in the legal profession, many young lawyers may consider beginning a solo practice but want support. Perhaps the section could work on providing resources for those attorneys, beyond the resources offered by the LOMAP office.

**5. Describe any obstacles you might face that would potentially prohibit your full participation in this program.**

I do not anticipate any obstacles. I am busy building my practice, as we all are, but view this opportunity as way to help do that.

**6. Would you be interested in serving on a substantive RPPT committee (legislation or continuing legal education)? If "yes," which committee?**

Yes – the CLE committee would interest me, and I would be open to other committee memberships as well.

**Sharon Conaway Rutberg, J.D.**
1734 NW Market Street
Seattle, WA 98107
206-409-2604
email@sharonrutberglaw.com

## PROFESSIONAL EXPERIENCE

**Law Office of Sharon C. Rutberg, PS**, Seattle, WA, 2014 – present
Solo law practice providing estate planning and probate services to families and individuals.

**Freelance Legal Author and Editor**, Seattle, WA, 2005–present
Supplement author and legal editor. Provide writing, editing, proofreading, and research services to publishers, authors, and attorneys. Clients include:

- Lawpress Corp., Tiburon, CA (author/editor of supplements for five law books)
- BNA Books (division of Bloomberg BNA), Arlington, VA
- Washington State Bar Association, Continuing Legal Education section, Seattle, WA

**Family and Home Network**, Vienna, VA, 1999–2004
Wrote and edited policy-related documents and published articles on parenting and child development.

**U.S. Department of State**, Washington, DC, 1994–1997
Attorney-adviser in the Office of the Legal Adviser. Headed 20-person litigation team. Drafted, edited, and produced multi-volume briefs for filing in international court. Reviewed and edited consulting expert reports.

**Office of the White House Counsel**, Washington, DC, 1994
Assistant Special Counsel to President Clinton. Drafted, edited, and produced testimony for White House personnel in connection with congressional hearings on Whitewater. Negotiated with congressional staff. Prepared legal memoranda for President and White House Counsel.

**Wilmer, Cutler & Pickering** (now WilmerHale), Washington, DC, 1988–1994
Associate litigation attorney practicing in the areas of product liability, RICO, banking, antitrust, insurance, and class action, among others. Extensive drafting, editing, proofreading, and production of legal documents, including briefs, motions, memoranda, talking points, white papers, and consultant reports. Conducted depositions and argued motions in court.

**Sextant Publishing Co.**, Washington, DC, 1981–1985
Assistant publisher of technology magazine and newsletter. Wrote and edited articles and managed all aspects of production.

## EDUCATION

**Northwestern University School of Law**, Chicago, IL

- Awarded J.D. degree cum laude in 1988. Order of the Coif (top 10 percent).
- *Northwestern University Law Review*, Note and Comment Editor. Edited three student articles, all of which were selected for publication.
- Published comment: *The Continuing Search for Solutions to the Drinking Driver Tragedy and the Problem of Social Host Liability*, 82 NW. U. L. REV. 409 (1988), *reprinted in* PERS. INJ. REV. 553 (1989).

**Swarthmore College**, Swarthmore, PA
Awarded B.A. degree with honors in 1981. Art history major, economics minor.

**PROFESSIONAL AFFILIATIONS**
Washington State Bar Association (member since 2014)
King County Bar Association (since 2014)
National Association of Elder Law Attorneys (since 2016)
Washington Association of Elder Law Attorneys (since 2016)
District of Columbia Bar (member since 1989)

**COMMUNITY SERVICE**
Queen Anne Chamber of Commerce, Board Member (since 2016)
Temple Beth Am, Refugee Resettlement Task Force, Member (since 2016)
McClure Middle School, PTSA Board, President (2010–2012)
Temple Beth El, San Mateo, CA, Sunday Sandwich Hevre, Director (2001–2003)

**PERSONAL INFORMATION**
Married to Bryan M. Rutberg, two college-age children. Love walking my dogs, reading, and classic R&B music.