



# WSBA Spring Section Leaders Meeting

April 7, 2026, 11 a.m.-1 p.m.

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**A Resource Expo Experience**

*April 7, 2026 | 11 a.m. – 1:00 p.m.*

**AGENDA**

11:00	<b>Welcome &amp; Plan for The Day</b>	Carolyn MacGregor, <i>Sections Program Specialist</i> Kevin Plachy, <i>Advancement Department Director</i>
11:05	<b>Sections Program Updates</b>	Carolyn MacGregor, <i>Sections Program Specialist</i> Noah Baetge, <i>Sections Program Coordinator</i> Vanessa Sweeney, <i>MSE Program Coordinator</i>
11:20	<b>FY27 Budget Planning</b>	Maggie Yu, <i>Controller</i> Darshita Patel, <i>Senior Accountant &amp; Budget Analyst</i> Carolyn MacGregor, <i>Sections Program Specialist</i> Shanthi Raghu, <i>Education Programs Manager</i>
11:50	<b>CLE On-Demand Learning Management System Update</b>	Rex Nolte, <i>Broadcast Services Manager</i> Whitney Johnson, <i>Digital Product Specialist</i>
12:05	<b>Resource Fair</b>	Katrina Mulligan, <i>Senior Legal Editor</i> Saleena Salango, <i>Equity and Justice Lead</i> Sandra Schilling, <i>Professional Responsibility Counsel</i> Chelle Gegax, <i>Member Services and Engagement Specialist</i>
12:55	<b>Closing Remarks &amp; Adjourn</b>	Noah Baetge, <i>Sections Program Coordinator</i>

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*This meeting will be recorded and available for viewing after the event.*



# ANNUAL SPRING SECTION LEADERS MEETING

A Resource Expo Experience

Tuesday, April 7, 2026  
11:00 a.m. – 1:00 p.m.

# WELCOME AND PLAN FOR THE DAY

- Section Program Updates
- FY27 Budget Planning
- CLE On-Demand Learning Management System Update
- Resource Fair
- Closing Remarks & Adjourn

Carolyn MacGregor, *Sections Program Specialist*  
Kevin Plachy, *Director of Advancement*



# Welcome to the 2026 Section Leaders Spring Meeting

- Section membership numbers are increasing
  - April 1, 2025 – 14,543 section memberships
  - April 1, 2026 – 15,980 section memberships
- Member Engagement Council Survey Devoted to Sections
  - Goal of the survey is to learn more about what members value about section membership, why they haven't joined a section and what would motivate them to do so.
  - MEC received feedback from section officers via a survey earlier this year. That feedback will inform the survey questions asked of members.
  - Partnership with NBRI - will be deployed to WSBA members in 3<sup>rd</sup> or 4<sup>th</sup> quarter of FY26
  - Once the results are received, the MEC will share them with section leadership.

## THANK YOU FOR YOUR LEADERSHIP AT WSBA

- Sections are key partners in promoting the WSBA's mission to serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.
- Sections Further WSBA's Purpose under GR12.2
- (2) Promote an effective legal system, accessible to all. (3) Provide services to its members and the public. (4) Foster and maintain high standards of competence, professionalism, and ethics among its members. (8) Administer programs of legal education.

# SECTIONS TEAM UPDATES

Carolyn MacGregor, *Sections Program Specialist*  
Noah Baetge, *Sections Program Coordinator*  
Vanessa Sweeney, *MSE Program Coordinator*



# ELECTIONS

## Elections Timeline

- April 20 - Applicant Portal Closes\*
  - Nominating committees have access to review applications while portal is open
- May 11 - Candidate slate form due\*
- May 26 – Ballots approved by section contact\*
- June 1 - Voting begins\*
- July 6 - Final results sent to section chairs

*\*Some sections are following an alternate timeline*

## Important Elections Notes

- *Those interested in another term in their current position must complete an application on the portal*
- Best avenues for attracting applicants:
  - Section List Serve
  - Personal & Professional Networks
  - Social Media
  - Requesting Section Roster
- Focus on EC recruitment now!
- If your section needs assistance with recruiting, email [noahb@wsba.org](mailto:noahb@wsba.org).

## EXTERNAL AI TOOLS DURING MEETINGS/EVENTS

- Must notify meeting participants in advance of using AI recording or notetaking tool
  - Includes notice provided by AI tool (e.g., “this meeting is being recorded.”)
- Check for accuracy!
- Disclose use in meeting documents, for example: “These minutes were recorded with the assistance of [insert AI tool] and reviewed for accuracy by [insert name].”
- Recordings are subject to public records requests; recommend deleting within several days.

[WSBA AI Use Policy for External Parties](#)

# PURCHASE AND SERVICE OF ALCOHOL AT WSBA EVENTS

Whenever alcohol is present at an event:

- Drinks must be served by a licensed and insured bartender. Insurance must be verified with a minimum liquor liability limit of \$1M occurrence/\$2M aggregate;
- At any WSBA event where drinks are provided to attendees free of charge, attendees are limited to two free drinks per function. When a hosted bar is provided, drink tickets must be issued to attendees with no more than two tickets issued per attendee; and
- Non-alcoholic beverages must be made available at any event where alcohol is provided. If hosted alcoholic beverages are offered, then hosted non-alcoholic beverages must also be offered.

[WSBA Alcohol Policy and Procedures](#)

# USE OF SECTION FUNDS TO PURCHASE ALCOHOL

Must be a qualifying event:

- Section function
  - Event is intended to benefit section members
  - All section members are invited to attend
- Speakers Dinner
  - Event honoring many speakers and/or volunteers contributing to section.
    - Invitations must be extended to at least eight honorees.

[WSBA Alcohol Policy and Procedures](#)

## WORKING WITH WSBA – EVENT PLANNING



There are so many in-person events happening this spring. This is GREAT!

With so many details to manage involving other EC members, vendors, sponsors, and guests – is there a way to streamline the process?

# WORKING WITH WSBA – EVENT PLANNING

**YES!**

Step 1 – Determine the primary contact person on the EC for the event.

Step 2 – Check in with Carolyn as **soon as** you start planning an event

Step 3 – Create a timeline and to-do list, including items required by WSBA



# WORKING WITH WSBA – EVENT PLANNING



Questions to consider:

- Estimated expenses - do we have funds budgeted for this?
- Are there any event partners: WSBA CLE, another section, firm, organization?
- Is a signed agreement needed (contract, MOU, LOA)?
- Will there be alcohol at the event?
- Who is the target audience?
- How will we publicize the event?

# WORKING WITH WSBA – EVENT PLANNING

With this information, Carolyn will determine what steps or items are required by WSBA and the estimated time to allow for reviews of agreements and flyers, budget requests, scheduling eblasts, etc.

Now it's calendar time!



# WORKING WITH WSBA – EVENT PLANNING



Maximize your efforts for future benefit:

- Take notes, keep a record of timeline
- Describe what worked and what could be improved
- Make available to next year's committee, especially for recurring events

# NEW MEMBER LIAISON TO SECTIONS

[New Member Liaisons](#) (NML) to Sections are participants of a voluntary program that creates opportunities to strengthen the connection between WSBA Sections and the new members of the legal community.

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- Offers a direct connection between new members and your Section
- Many NMLs have continued into additional leadership roles, including section EC's, committee chairs, and Board of Governors members
  - Program kick-off for NML positions beginning Oct. 1, 2026, will take place mid April
    - Questions? Contact Chelle Gegax at [michelleg@wsba.org](mailto:michelleg@wsba.org)

# FY 2027 BUDGET PLANNING

*Maggie Yu, Controller*

*Darshita Patel, Senior Accountant & Budget Analyst*

*Carolyn MacGregor, Sections Program Specialist*



# FISCAL YEAR (FY) 2027 BUDGET SCHEDULE

- ▶ **April 13:** Budget materials sent to Section Leaders
- ▶ **June 8:** Sections Leaders submit first draft of budget worksheet and dues change request
- ▶ **May 1:** Budget Process Drop-In Calls
- ▶ **May 18:** B&A reviews/approves PMC
- ▶ **June 25:** Sections Team sends review comments to Section Leaders
- ▶ **July 16:** Deadline for Sections to submit final budget worksheet
- ▶ **August 24:** WSBA Budget & Audit (B&A) Committee meeting reviews Section budgets
- ▶ **September 24-25:** WSBA Board of Governors approves budget

# DOCUMENTS

- ▶ Items for Submission:
  - ▶ FY27 Section Budget Request Worksheet
  - ▶ Request to Change Member Dues
- ▶ Informational Items:
  - ▶ Section Membership Dues History
  - ▶ Section Membership Count History
  - ▶ Section Fiscal Policies

*All materials distributed on April 13*

# ITEMS FOR SUBMISSION

## 1. FY27 Section Budget Request Worksheet

- ▶ Sample request worksheet included in meeting materials
- ▶ Worksheet includes:
  - FY21 – FY26 YTD, FY26 budget and actual financial information as of February
  - FY 2027 Budget column for Section leaders to input dollar amounts
  - “Section Narrative” column to be filled out by Section explaining the purpose of the funds and any calculations or additional information to support the FY 2027 budget figure

## 2. Request to Change Member Dues

- ▶ Only needed if planning a change to member dues for FY 2027

**Both items due by June 8, 2026**

# INFORMATIONAL ITEMS

## 1. Section Membership Dues History

- Document shows the membership dues for each section for the past 5 years (2022-2026)

## 2. Section Membership Count History

- Document shows the membership counts for your section over the past 5 years as well as the year-to-date count (2022-2026)

## 3. Section Fiscal Policies

- Provides information about WSBA's guidelines for section financial activity
- Fund balance guidelines:
  - Section fund balance should be enough to sustain a consistent level of programming in the event there are severe fluctuations in annual section membership (six months' worth of direct programming expenses are recommended as a guideline)
  - Sections are discouraged from maintaining fund balances in excess of two years' worth of direct programming expenses and specified purposes
  - Sections are not permitted to propose a deficit fund balance

# INFORMATIONAL ITEMS

## 4. FY27 Per-Member-Charge Calculation

- The FY27 Per-Member Charge is scheduled to be reviewed and approved by the Budget & Audit Committee at their May 18 meeting.

# BUDGET PLANNING TIPS

- 1 Review budget timeline and EC meeting dates to allow for voting on proposed budgets within meetings.
- 2 Involve chair-elect (if applicable) in the planning to be sure proposed budget allows for new ideas, direction.
- 3 Provide budget narrative to capture planning rationale and serve as a reference for future years.
- 4 Allow and account for flexibility in the budget narrative, relative to fund balance. An inflated budget over successive years can obscure actual expense history and confuse future planning.
- 5 Remember when creating your draft budget that current fund balances do not reflect all FY26 expenses. Consider all FY26 expenditures (complete and remaining) when calculating FY27 estimates.

# CLE PLANNING TIPS

- Seminar Splits with CLE are projections only
  - Based on revenues anticipated through end of FY27, and considering programs delivered
- Note your intentions to develop and deliver CLEs (if relevant) in partnership with WSBA CLE
- Most expenses related to CLEs– facilities, basic refreshments and AV – are covered by the program budget.
  - However, the section may want to budget for additional expenses, such as
    - Out of state travel for speakers
    - Honoraria
    - EC registrations to attend a CLE
    - Receptions or luncheons

*Please reach out to discuss your plans so we may help determine if and what may fall to the section to budget.*

*Questions about budgeting for CLEs? Contact [Shanthi Raghu](#)*

# SAMPLE BUDGET WORKSHEET

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P							
ADD ADDITIONAL REVENUE/EXPENSE LINES IF NEEDED: (see "Accounts" tab for list of accounts)					<b>Washington State Bar Association</b>																	
					<b>SAMPLE SECTION BUDGET</b>																	
				<b>ENTER NUMBERS BELOW:</b>																		
Planned number of members in FY2027:				184																		
Planned FY2027 Dues Rate:				\$25.00																		
Per Member Charge (PMC) - provided by WSBA				\$18.75																		
					Sections Narrative: Enter description of how the budgeted funds will be used.		WSBA Comments															
					Budget		Budget		Actuals		Actuals		Actuals		Actuals							
<b>REVENUE:</b>																						
40500 INTEREST - INVESTMENTS							172		-		900		111		4		65		147			
41805 MINI-CLE REVENUE							10,000		4,400		-		945		2,000		5,000		123		-	
41850 SEMINAR SPLITS W/ CLE							3,000															
41875 SEMINAR SPLITS W/ OTHERS							4,000		1,000		-		-		-		-		-		-	
48200 SECTION DUES REVENUE							3,450		5,000		2,212		2,226		2,242		1,949		3,150		2,010	
48225 FISCAL/MEMBERSHIP YEAR ADJUSTMENT							1,250		2,500		950		725		750		825		1,125		635	
<b>TOTAL SECTION DUES REVENUE</b>							<b>4,700</b>		<b>7,500</b>		<b>3,162</b>		<b>2,951</b>		<b>2,992</b>		<b>2,774</b>		<b>4,275</b>		<b>2,645</b>	
<b>TOTAL REVENUE:</b>							<b>21,700</b>		<b>13,072</b>		<b>3,162</b>		<b>4,796</b>		<b>5,103</b>		<b>7,778</b>		<b>4,463</b>		<b>2,792</b>	
<b>DIRECT EXPENSES:</b>																						
50165 CONFERENCE CALLS									165		-		-		-		-		70		202	
55555 NEW EXPENSE ACCOUNT NEEDED																						
58125 ANNUAL OR OTHER MEETING EXPENS							5,000		4,000		-		-		-		-		-		-	
58150 ATTENDANCE AT BOG MEETINGS									100		-		-		-		-		-		-	
58175 AWARDS							1,000															
58300 EXECUTIVE COMMITTEE EXPENSES									100		-		126		-		-		-		-	
58325 LDSHIP/PROF DEVELOP/RETREATS							8,000		700		-		1,443		486		240		537		-	
58350 MEMBERSHIP & RECRUITING EXP									500		-		-		-		-		180		88	
58375 NEWSLETTER/PUBLICATION EXPENSE																						
58400 PER MEMBER CHARGE							2,588		5,500		1,400		1,332		1,408		1,186		1,969		1,294	
58415 FISCAL/MEMBERSHIP YEAR ADJUSTMENT							1,375		1,500		650		525		450		425		600		435	
<b>TOTAL PER MEMBER CHARGE</b>							<b>3,963</b>		<b>7,000</b>		<b>2,050</b>		<b>1,857</b>		<b>1,858</b>		<b>1,611</b>		<b>2,569</b>		<b>1,729</b>	
58450 RECEPTION/FORUM EXPENSE							1,000															

# SAMPLE BUDGET WORKSHEET – CLE TABLE

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O																																	
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	9/30/2027 FY 2027	9/30/2026 FY 2026	9/30/2026 FY 2026	9/30/2025 FY 2025	9/30/2024 FY 2024	9/30/2023 FY 2023	9/30/2022 FY 2022	9/30/2021 FY 2021																																							
Budget	Budget	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals																																							
58500 NEW LAWYER OUTREACH					200 - - - - -																																										
58525 SCHOLARSHIPS/DONATIONS/GRANT					200 - - - - -																																										
58600 SECTION SPECIAL PROJECTS					500 - - - - -																																										
58615 LAW SCHOOL OUTREACH																																															
58620 MINI-CLE EXPENSE					500 112 - 112 112 112 - -																																										
58625 SEMINAR EXPENSE - SECTIONS					500 100 - - - - -																																										
<b>TOTAL DIRECT EXPENSES:</b>					<b>19,963 13,677 2,050 3,538 2,456 1,963 3,356 2,019</b>																																										
<b>NET INCOME:</b>					<b>1,738 (605) 1,112 1,257 2,648 5,814 1,107 773</b>																																										
<b>PRIOR YEAR FUND BALANCE:</b>					<b>16,936 17,542 17,542 16,284 13,637 7,822 6,715 5,943</b>																																										
<b>NEW FUND BALANCE:</b>					<b>18,674 16,936 18,653 17,542 16,284 13,637 7,822 6,715</b>																																										
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# QUESTIONS/CONTACTS

If you have any questions or need assistance with your budget, please reach out to your Sections Team or the Finance Team.

- Sections Team Contacts:
  - Carolyn MacGregor, Sections Programs Specialist
    - [carolynm@wsba.org](mailto:carolynm@wsba.org)
    - 206-727-8311
  - Noah Baetge, Sections Program Coordinator
    - [noahb@wsba.org](mailto:noahb@wsba.org)
    - 206-727-8225
- Finance Team Contacts:
  - Maggie Yu, Controller
    - [maggiey@wsba.org](mailto:maggiey@wsba.org)
    - 206-727-8281
  - Darshita Patel, Senior Accountant & Budget Analyst
    - [darshitap@wsba.org](mailto:darshitap@wsba.org)
    - 206-733-5900

# CLE ON-DEMAND LEARNING MANAGEMENT SYSTEM UPDATE

Rex Nolte, *Broadcast Services Manager*  
Whitney Johnson, *Digital Product Specialist II*



# QUESTIONS?

Rex Nolte – [rexn@wsba.org](mailto:rexn@wsba.org)

Whitney Johnson – [whitneyj@wsba.org](mailto:whitneyj@wsba.org)

# RESOURCE FAIR

*Katrina Mulligan, Senior Legal Editor*

*Saleena Salango, Equity and Justice Lead*

*Sandra Schilling, Professional Responsibility Counsel*

*Chelle Gegax, Member Services and Engagement Specialist*



# RULE OF LAW AMBASSADOR PROGRAM

Katrina Mulligan, *Senior Legal Editor*



# Rule of Law Ambassador Program

## Foundations

**Education. Civic Engagement. Trust. Confidence.**

Core to the role of lawyers and the mission of the WSBA.

“[A] lawyer should further the public’s understanding of and confidence in the rule of law and the justice system...”

—[RPC Preamble: A Lawyer’s Responsibilities](#)

“[T]he Washington State Bar Association strives to ... promote understanding of and respect for our legal system and the law.”

—[General Rule 12.2](#)



# Rule of Law Ambassador Program

## Goal

### *What it's about...*

Helping legal professionals connect with their communities—to educate, engage, and build trust in the rule of law

### *Now, more than ever...*

[In a time of growing division, our democracy depends on local voices supporting the legal system.](#)

### *The goal...*

Help to build a legal community united in strengthening public trust in and understanding of our constitutional democracy in our local communities



# Rule of Law Ambassador Program

## Components

### Rule of Law Ambassador Tool Kit

- refresh our understanding of the Rule of Law, spread accurate and digestible information about the legal system, demonstrate a nonpartisan commitment to civic discourse
- Reading material, videos, CLE—*Rule of Law and Constitutional Crises for Lawyer Ambassadors*

### CLEs

- [Speak Up for Justice Washington!](#)—series of CLE events to empower local legal communities to combat the growing violence and violent rhetoric threatening the judiciary

### Lawyers in the Classroom

- resources to help connect attorneys with local schools and classroom teachers
- volunteer time can be logged as pro bono service hours

### Mailing List

- email [ambassadors@wsba.org](mailto:ambassadors@wsba.org)

# Rule of Law Ambassador Program

Law Day 2026

*Take the pledge to connect with local schools to help the next generation of leaders understand and build upon the Constitution's promise.*

Constitution Day—September 17, 2026

Learn more at <https://www.wsba.org/about-wsba/ambassadors>

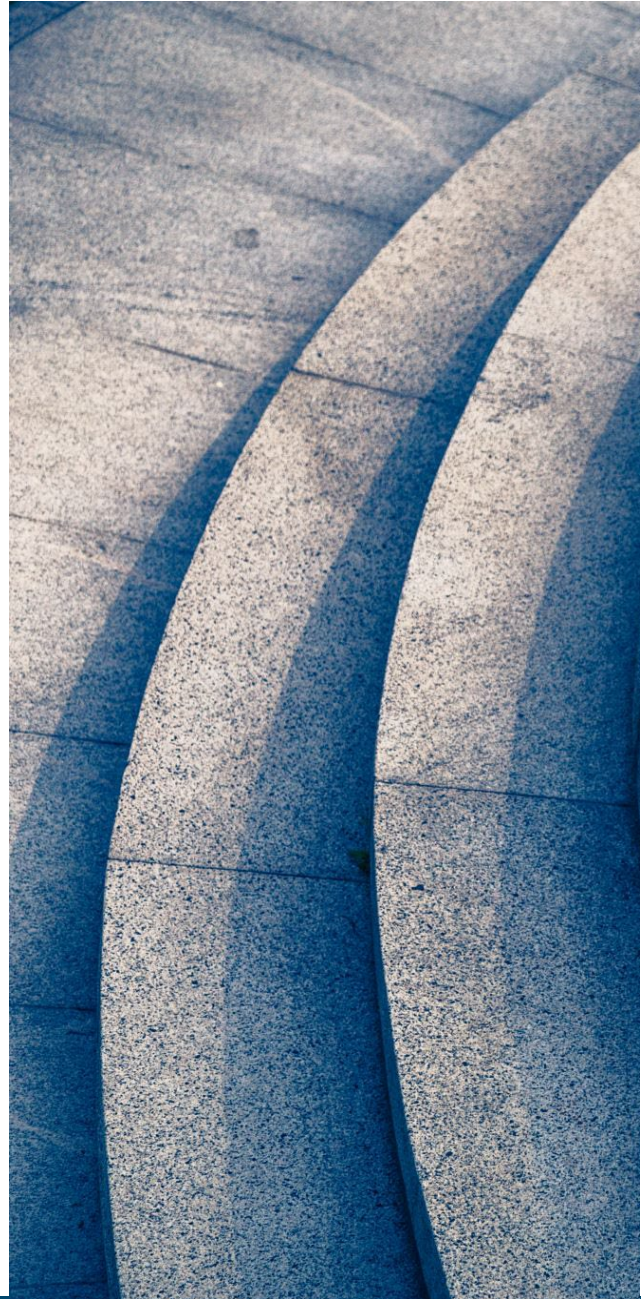


# Rule of Law Ambassador Program

Get Involved

Visit <https://www.wsba.org/about-wsba/ambassadors>

Join the mailing list by emailing [ambassadors@wsba.org](mailto:ambassadors@wsba.org)



# EQUITY AND JUSTICE TEAM

Saleena Salango, *Equity and Justice Lead*



WSBA EQUITY & JUSTICE TEAM

# Areas Of Work

- Pro Bono & Public Service
- Access To Justice
- Professional Diversity & Belonging
- Member Education (ethics & equity focus)
- Strategic Planning & Organizational Development

# WSBA EQUITY & JUSTICE TEAM

## How We Can Partner With You



Project Consultations



Equity Analyses



Trainings & Workshops



Resource Curation &  
Development

# INTERESTED IN PARTNERING?

1. Email us:  
[equityandjustice@wsba.org](mailto:equityandjustice@wsba.org)
2. Book a meeting:  
Scan the QR code or visit our [Microsoft Bookings page](#)



# PROFESSIONAL RESPONSIBILITY PROGRAM

Sandra Schilling, *Professional Responsibility Counsel*



# WHO ARE WE?

We're a little team. Just the two of us.

Jeanne Marie Clavere, Senior Professional Responsibility Counsel

Sandra Schilling, Professional Responsibility Counsel



# WE WORK TO BE ACCESSIBLE AND APPROACHABLE

ETHICS LINE  
(206) 727-8284

CONFIDENTIAL

NO RECORD

# THE ETHICS LINE

Admission to Practice Rule 19: a confidential telephone line dedicated to ethics inquiries

1943 calls in FY 2025

...We talk a lot!

# SOME EXAMPLES HOT OFF THE PRESS

My question involves RPC 1.7 and 1.9. I'm currently working as a public defender for XXX County, which is a public defender office. I was recently assigned a misdemeanor assault for domestic violence case where the alleged victim in this matter was previously represented by another attorney in our office on a felony residential burglary, domestic violence, where my client was the alleged victim. The question is, does this create a conflict of interest in my current representation or can this be properly screened? Thank you.

Hi there, my name is XXXX, bar license number XXXX phone number XXXX. Ethical rule 1.8, paragraph 17 and 18. General question on, I live in a very, very small town and I am interested in dating a former client. So just my bosses wanted me to call and run that one through the ethics hotline before I potentially got myself in any trouble and appreciate the call back and look forward to our discussion. Thank you. Bye.

Hi, this is XXX , bar number XXX, and I'm calling about an issue, I think it's involving RPC 1.15A. Basically, what's happened is I've settled a case for my client, an injury case, and I was holding a small amount of funds to resolve a reimbursement claim. She died before that issue could be resolved, and I don't think any probate has been opened, but her boyfriend is now claiming the funds and I'm just trying to figure out... He's trying to sue me also, so I'm trying to figure out what I need to do ethically. So, if you could call me back, I'd appreciate it, Thank you.

# AND WE TALK MORE!

## PRESENTATIONS

36 presentation in FY 2025

41 presentations in FY 2024

# AND MORE!

We present virtually, and all over the state:

- Seattle, Tacoma, Olympia and Sequim
- Richland, Port Angeles, Port Townsend, Cle Elum, Spokane
- And out of state: Chicago!

# EXAMPLES OF PRESENTATION TOPICS

- Common Ethical Dilemmas and Recent RPC Amendments
- Ethical Issues in Communication and Solicitation
- Ethical Issues in the Use of Artificial Intelligence
- Ethics for In-House Counsel
- Ethics for Government Lawyers
- Ethics of Closing a Law Office
- Ethical Issues in Legal Aid Advocacy
- Ethics and Technology

# WORKING WITH THE ETHICS, WELLNESS AND PRACTICE TEAM

Meetings and collaboration with Wellness and Practice Management programs, preparing educational content, articles, Closing an Office CLE, and Closing an Office Guidebook.

# WE SUPPORT THE COMMITTEE ON PROFESSIONAL ETHICS

- Organize meetings: Agendas, Minutes, and Materials
- BOG Memos and GR 9 Rule Change Submissions
- Collaborate with the Legal Technology Task Force
- WSBA pages: The CPE and the Ethics pages
- Advisory Opinions site: New opinions and revised opinions
- Provide gentle guidance and quiet cheerleading support to the chair and the members, administrative like scheduling, recruitment, tracking assignments, setting reminders, expense reports

# RECENT ADVISORY OPINIONS

- See [wsba.org](http://wsba.org) for Advisory Opinions

# ADVISORY OPINION 202601

## LANGUAGE ACCESS ISSUES FOR LAWYERS

Lawyers have an ethical duty to make reasonable use of qualified interpreters, translators, or other translation services to bridge any language gaps with clients who are unable to fully communicate with the lawyer due to communication barriers. In utilizing these services, the lawyer also has an ethical duty to be careful to preserve client confidences, including reasonable oversight of any translator or interpreter.

# 202505 ARTIFICIAL INTELLIGENCE-ENABLED TOOLS IN LAW PRACTICE

Seven duties under the Washington RPCs when using AI tools in law practice:

- (1) COMPETENCE RPC 1.1**
- (2) DILIGENCE RPC 1.3**
- (3) CONFIDENTIALITY RPC 1.6**
- (4) COMMUNICATION RPC 1.4**
- (5) CANDOR TOWARD TRIBUNALS RPC 3.3**
- (6) SUPERVISION OF LAWYERS AND NONLAWYERS RPCS 5.1 AND 5.3**
- (7) BILLING FOR THEIR USE CONSISTENT WITH RPC 1.5**

# MORE 2025 ADVISORY OPINIONS:

**AO 202502** Use of Non-Practicing Lawyer's Name in Firm Name by Purchaser of a Law Practice: RPC 1.17, 7.1 It is misleading for purchaser to use selling lawyer's name.

**AO 202503** Disputed Funds Held in Trust: RPC 1.15A, Lawyer must hold funds in trust and make reasonable efforts to determine validity of claims.

**AO 202504** Fee Division Contracts with Departing Lawyers: RPC 5.6, While not prohibited, fee divisions must bear a reasonable relationship to the law firm's investment in the departing client matters.

# WE WRITE AND REVIEW

- Ethics Blogs - NWSidebar
- Ethics FAQs
- Washington State Bar News

**WHAT ELSE CAN WE TELL YOU ABOUT  
THE PRP??**



**THANK YOU!**

Jeanne Marie Clavere – [jeannec@wsba.org](mailto:jeannec@wsba.org)

Sandra Schilling – [sandras@wsba.org](mailto:sandras@wsba.org)

# FUTURE LAWYERS, MENTORSHIP, AND NEW MEMBERS

*Chelle Gegax, Member Services and Engagement Specialist*



# MEMBER SERVICES AND ENGAGEMENT

## *Future Lawyers*

2025 Future Lawyer Survey Findings

- Student loan debt concerns
- Desire for debt-management resources
- Unmet professional needs



## *Bridging the Gap*

- Law Student & APR6 Law Clerk Representatives
- Highlight Law Student Memberships
- Consider networking opportunities that include law students & APR6 Law Clerks

# MEMBER SERVICES AND ENGAGEMENT

## MENTORSHIP

**MentorLink Mixers:** Unique, free-to-attend, one-time events that bring together people with similar interests in the legal profession.

**Mentorship Program Toolkit:** WSBA Mentorship created the Mentorship Program Toolkit to assist organizations to develop MCLE accredited mentorship programs



WSBA MentorLink MIXER

RSVP TODAY!

In Partnership with:  
WSBA Business Law Section

APRIL 28, 2026 | 4:00-5:30 P.M. | FREE

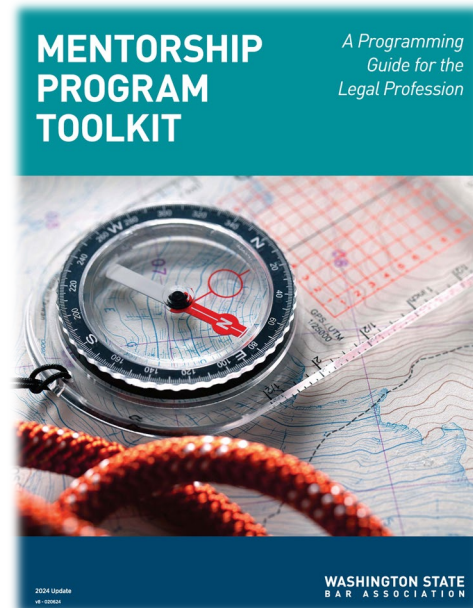
PLEASE SEND QUESTIONS TO:  
[mentorlink@wsba.org](mailto:mentorlink@wsba.org)

WASHINGTON STATE  
BAR ASSOCIATION

SCAN THE QR CODE TO RSVP

2024 Update  
v1-2024x

The poster features a woman in profile looking at a laptop screen displaying a video call. A QR code is positioned to the right of the laptop. The background is a soft-focus office setting.



MENTORSHIP PROGRAM TOOLKIT

A Programming Guide for the Legal Profession

WASHINGTON STATE  
BAR ASSOCIATION

2024 Update  
v1-2024x

The cover features a close-up of a compass and a map, with a red string or cord draped across the bottom. The background is a light, textured surface.

Thinking of establishing a Mentorship Program? Questions about the toolkit? [Click here to book a consultation!](#)

# MEMBER SERVICES AND ENGAGEMENT

- **Change in New Member definition** effective October 1, 2025
- **Public Service Leadership Award** – Nominations open May 1
- **Mentorship Program Lunch & Learn Sessions**  
Public Speaking, Client Interactions, Office Interactions
- **New Member Social Events**  
After Bar Exam Social, TAP New Member Social, regional social events following WNMC meetings
- **Strengthening Law Student Involvement** – Law student socials, panels and more!



# Q&A SESSION

Do you have questions about:

- Section Updates
- Budget Planning
- LMS
- Resource Fair
  - Rule of Law Ambassador Program
  - Equity & Justice
  - Professional Responsibility Program
  - Future Lawyers, Mentorship, New Members

# CLOSING REMARKS & ADJOURN

[2026 Spring Section Leaders Survey](#)





*Image credit: WSBA Celebrates National Volunteer Week April 18 - 24, 2021*

# *Thank you!*

Sections are partners in promoting the WSBA's mission to serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.

