



WASHINGTON STATE BAR ASSOCIATION

Taxation Section

AGENDA

WSBA Tax Section Executive Committee

Friday, October 20, 2023; 8:00 to 9:00 a.m. (Meeting via Zoom)

SEE CALANDER INVITE FROM MEGAN TAHL FOR ZOOM LINK.

[Join Meeting](#)

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1. Call to Order, Attendance, Approval of Meeting Minutes.
 - May 19, 2023
 - September 15, 2023
2. Treasurer's Report (Jason Harn)
3. New/Ongoing Items
 - Website Update –
 - Updates to DEI Information and Resources
 - Opportunities at the UW Tax Clinic
 - Local Tax Court Settlement Days: Nov. 1 & 2, 2023
 - a. Assist a pro se taxpayer in trying to resolve their Tax Court case with the IRS.
 - National Tax Court Settlement Days: Nov. 8 & 9, 2023
 - a. Assist a pro se taxpayer in trying to resolve their Tax Court case with the IRS.
 - Tax Court Calendar: Dec. 18
 - a. Assist a pro taxpayer in trying to resolve their Tax Court case with the IRS.
 - Tax presentations to community: October, 2023 through June, 2024
 - a. Law students run tax presentations to community organizations.
Volunteer attorney attends to give added advice.
 - FY23 Annual Report Form Submitted to the WSBA as of 10/13/2023
 - Transition to new leadership
 - Status of the Taxation Section Scholarship
 - We currently understand that the scholarship has been paid from the section to the WSBA foundation.
 - We are waiting for confirmation on whether the scholarship was paid to the ultimate recipient.
 - Proposed new IRS Liaison
 - Najja O. Bullock
4. Committee / Liaison Reports, Ideas, Goals
 - Estate & Gift Tax (Cat Connell & Reed Jones)
 - International Tax (Al A. Sierra)
 - Transactional Tax (Dan Sito and *Daniel Ng*)
 - IRS Liaison (*Najja O. Bullock* & Rich Johnson)
 - DOR Liaison (Tina Poley and Kimberly Anderson)
 - Legislative (Brett Durbin & Callie Castillo)
 - Communications & Website (Jay Jetter)
 - Young Lawyers (Daniel French)
 - Outreach/Scholarship (Jennifer Gellner)
 - Pro Bono Committee (Darin Jensen)
 - State & Local Tax (SALT) (Aaron Johnson)
 - CLE (Sofia Meglioli & Jason Harn)

- DEI (Ellen Tung & Jessica Bejerea)
- Board of Governors Liaison (Brent Williams-Ruth & Nam Nguyen)

5. Adjourn

Meeting Dates for 2023 - 2024

Time: 8:00-9:00 a.m.

Location: Virtual Meeting Only

Date:

September 15, 2023
 October 20, 2023
 November 17, 2023
 December 15, 2023
 January 19, 2024
 February 16, 2024
 March 15, 2024
 April 19, 2024
 May 17, 2024
 Annual Luncheon, TBD Date in May/June
 June 21, 2023 (cancel depending on Luncheon Date)

Current Executive Committee Members for 2023-2024

Name	Main Phone	Email	Committee Position	Employer
Kristi Richards	206-623-6501	krichards@radiuslawseattle.com	2023-2024 Immediate Past Chair	Radius Law Group
Megan Tahl	206-716-6830	mtahl@deloitte.com	2023-2024 Chair	Deloitte Tax LLP
Cat Connell	206-370-7847	cat.connell@klgates.com	2023-2024 Chair Elect / Estate & Gift Tax Co-Chair	K&L Gates
Jason Harn	206-223-0800	jharn@colvinhallett.com	2023-2024 Secretary / CLE Co-Chair	Colvin & Hallett
Alinsson A. Sierra		almullins.law@gmail.com	2023-2024 treasurer	
Reed Jones	206.292.3607	Reed.A.Jones@wellsfargo.com	Estate & Gift Tax Co-Chair	Wells Fargo
Open			International Tax Co-Chair	Open
Alinsson A. Sierra		almullins.law@gmail.com	International Tax Co-Chair	Ernst & Young
Dan Sito	206-359-6424	DSito@perkinscoie.com	Transactional Tax (starting 2023-2024 will be co)	Perkins Coie
<i>Daniel Ng (PROPOSED)</i>		<i>daniel.ng@dechert.com</i>	Need to vote in October 2023 to make co-Transactional tax.	Dechert LLP
<i>Najja O. Bullock (PROPOSED)</i>		<i>Najja.O.Bullock@irs.counsel.treas.gov</i>	IRS Liaison Co-Chair	IRS Counsel
Jay Jetter	206-386-7533	jay.jetter@stoel.com	Communications & Website Chair	Stoel Rives
Dan Jensen	360-534-1347	danj@dor.wa.gov	DOR Liaison	WA DOR ARHD
Tina Poley		TinaP@DOR.WA.GOV	Co-DOR Liaison	WA DOR

Kimberly Anderson		KimberlyA@dor.wa.gov	Co-DOR Liaison	WA DOR
Richard Johnson	206-357-5084	rjohnson@lesourd.com	IRS Liaison Co-Chair	LeSourd & Patten, P.S.
Aaron Johnson	206-223-7430	johnsona@lanepowell.com	State & Local Tax	Lane Powell
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Jennifer Gellner	425-235-5535	jennifer@gellnerlawgroup.com	Scholarship Chair	Gellner Law Group
Daniel French	206-973-8298	dfrenchtax@gmail.com	Young Lawyer	WA Dept. of Revenue.
Aimee Miller	206-223-7098	MillerA@LanePowell.com	Young Lawyer Liaison	Lane Powell
Ellen Tung	310-592-7159	tellen@uw.edu	DEI Co-Chair	Tax LLM Candidate
Jessica Bejerea	(206) 484-8253	jessica.bejerea@outlook.com	DEI Co-Chair	
Brett Durbin	206-223-7041	DurbinB@LanePowell.com	Legislative Co-Committee	Lane Powell
Callie Castillo	206-223-7145	castilloc@lanepowell.com	Legislative Committee Co-Chair	Lane Powell
Bob Mahon	206-359-6360	RMahon@perkinscoie.com	At-Large	Perkins Coie
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Sandra Veliz	206-357-5082	sveliz@lesourd.com	At-Large	LeSourd & Patten, P.S.
Darin T. Jensen	(206) 624-1230	jensen@lasher.com	Pro Bono	Lasher Holzapfel Sperry & Ebberson
Brent Williams-Ruth (At Large)	(253) 285-7751	BrentWR.BOG@gmail.com	BOG Liaison (2022-2023)	Law Offices of Brent Williams-Ruth
Nam Nguyen (District 10)	(360) 664-0870	nam.wsba@gmail.com	Bog Liaison (2022-2023)	WA Attorney General's Office
Carolyn MacGregor		Carolynm@wsba.org	WSBA Staff Liaison	WSBA