



WASHINGTON STATE BAR ASSOCIATION

## Taxation Section

### AGENDA

#### WSBA Tax Section Executive Committee

**Friday, November 17, 2023; 8:00 to 9:00 a.m. (Meeting via Zoom)**

**SEE CALANDER INVITE FROM MEGAN TAHL FOR ZOOM LINK.**

### [Join Meeting](#)

Passcode: 833278

Phone one-tap: US: [+17209289299](tel:+17209289299), [94245712359](tel:+194245712359)#, ..., \*833278 or  
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Dial: US: +1 720 928 9299 or +1 213 338 8477 or +1 646 518 9805 or +1 312 626 6799

Meeting ID: 942 4571 2359

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#### International numbers

SIP: [94245712359.833278@zoomcrc.com](mailto:94245712359.833278@zoomcrc.com)

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1. Call to Order, Attendance, Approval of Meeting Minutes.
  - October 20, 2023
2. Treasurer's Report (Al A. Sierra)
3. New/Ongoing Items
  - Section Leaders Fall Orientation
    - November 13, 2023
    - [Volunteer Toolbox \(wsba.org\)](https://www.wsba.org)
  - Section member dues and future budget considerations
  - Spring Annual Luncheon
    - Venue and planning
    - Proposed Speaker – Washington State Supreme Court - Chief Justice Gonzalez
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 (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	<a href="mailto:krichards@radiuslawseattle.com">krichards@radiuslawseattle.com</a>	2023-2024 Immediate Past Chair	Radius Law Group
Megan Tahl	206-716-6830	<a href="mailto:mtahl@deloitte.com">mtahl@deloitte.com</a>	2023-2024 Chair	Deloitte Tax LLP
Cat Connell	206-370-7847	<a href="mailto:cat.connell@klgates.com">cat.connell@klgates.com</a>	2023-2024 Chair Elect / Estate & Gift Tax Co-Chair	K&L Gates
Jason Harn	206-223-0800	<a href="mailto:jharn@colvinhallettllaw.com">jharn@colvinhallettllaw.com</a>	2023-2024 Secretary / CLE Co-Chair	Colvin & Hallett
Alinsson A. Sierra		<a href="mailto:almullins.law@gmail.com">almullins.law@gmail.com</a>	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	<a href="mailto:DSito@perkinscoie.com">DSito@perkinscoie.com</a>	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	<a href="mailto:jay.jetter@stoel.com">jay.jetter@stoel.com</a>	Communications & Website Chair	Stoel Rives
Dan Jensen	360-534-1347	<a href="mailto:danj@dor.wa.gov">danj@dor.wa.gov</a>	DOR Liaison	WA DOR ARHD
Tina Poley		<a href="mailto:TinaP@DOR.WA.GOV">TinaP@DOR.WA.GOV</a>	Co-DOR Liaison	WA DOR
Kimberly Anderson		<a href="mailto:KimberlyA@dor.wa.gov">KimberlyA@dor.wa.gov</a>	Co-DOR Liaison	WA DOR
Richard Johnson	206-357-5084	<a href="mailto:rjohnson@lesourd.com">rjohnson@lesourd.com</a>	IRS Liaison Co-Chair	LeSourd & Patten, P.S.
Aaron Johnson	206-223-7430	<a href="mailto:johnsona@lanepowell.com">johnsona@lanepowell.com</a>	State & Local Tax	Lane Powell
Sofia Meglioli	206-716-6529	<a href="mailto:smeglioli@deloitte.com">smeglioli@deloitte.com</a>	CLE Co-Chair	Deloitte Tax LLP
Jennifer Gellner	425-235-5535	<a href="mailto:jennifer@gellnerlawgroup.com">jennifer@gellnerlawgroup.com</a>	Scholarship Chair	Gellner Law Group
Daniel French	206-973-8298	<a href="mailto:dfrenchtax@gmail.com">dfrenchtax@gmail.com</a>	Young Lawyer	WA Dept. of Revenue.
Aimee Miller	206-223-7098	<a href="mailto:MillerA@LanePowell.com">MillerA@LanePowell.com</a>	Young Lawyer Liaison	Lane Powell
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Brett Durbin	206-223-7041	<a href="mailto:DurbinB@LanePowell.com">DurbinB@LanePowell.com</a>	Legislative Co-Committee	Lane Powell
Callie Castillo	206-223-7145	<a href="mailto:castilloc@lanepowell.com">castilloc@lanepowell.com</a>	Legislative Committee Co-Chair	Lane Powell
Bob Mahon	206-359-6360	<a href="mailto:RMahon@perkinscoie.com">RMahon@perkinscoie.com</a>	At-Large	Perkins Coie
Darek Jarski	206-333-0750	<a href="mailto:djarski@jarskilaw.com">djarski@jarskilaw.com</a>	At-Large	Jarski Law PLLC
Sandra Veliz	206-357-5082	<a href="mailto:sveliz@lesourd.com">sveliz@lesourd.com</a>	At-Large	LeSourd & Patten, P.S.
Darin T. Jensen	(206) 624-1230	<a href="mailto:jensen@lasher.com">jensen@lasher.com</a>	Pro Bono	Lasher Holzapfel Sperry & Ebberson
Brent Williams-Ruth (At Large)	(253) 285-7751	<a href="mailto:BrentWR.BOG@gmail.com">BrentWR.BOG@gmail.com</a>	BOG Liaison (2022-2023)	Law Offices of Brent Williams-Ruth
Nam Nguyen (District 10)	(360) 664-0870	<a href="mailto:nam.wsba@gmail.com">nam.wsba@gmail.com</a>	Bog Liaison (2022-2023)	WA Attorney General's Office
Carolyn MacGregor		<a href="mailto:Carolynm@wsba.org">Carolynm@wsba.org</a>	WSBA Staff Liaison	WSBA