



WASHINGTON STATE BAR ASSOCIATION

Taxation Section

AGENDA

WSBA Tax Section Executive Committee

Friday, March 15, 2024; 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
[+12133388477](tel:+12133388477), [94245712359](tel:+194245712359)#, ..., *833278

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

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Passcode: 833278

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1. Call to Order, Attendance, Approval of Meeting Minutes.
 - January 19, 2023
 - February 16, 2024
2. Treasurer's Report (Al A. Sierra)
3. New/Ongoing Items
 - Vote to approve co-chair of the Transactional Tax Committee.
 - Daniel Ng
 - Vote to approve at-large position.
 - Rich Johnson stepping in for Sandra Veliz
 - Vote to approve Path Mentorship Program
 - Vote to approve Taxation Section Blog as part of the Taxation Section webpage.
 - Discussion regarding prior recipients of Taxation Section Scholarship
 - Vote to determine whether prior recipients will be eligible to receive the scholarship for a second year.
4. Committee / Liaison Reports, Ideas, Goals
 - Estate & Gift Tax (Cat Connell & Reed Jones)
 - Transactional Tax (Dan Sito and *Daniel Ng*)
 - IRS Liaison (Najja O. Bullock & Rich Johnson)
 - DEI (Jessica Bejerea)
 - DOR Liaison (Tina Poley and Kimberly Anderson)
 - Legislative (Brett Durbin)
 - State & Local Tax (SALT) (Aaron Johnson)
 - Communications & Website (Jay Jetter)
 - Outreach/Scholarship (Jennifer Gellner)
 - Pro Bono Committee (Darin Jensen)
 - CLE (Sofia Meglioli & Jason Harn)
 - International Tax (Al A. Sierra)
 - Young Lawyers (Daniel French)
 - Board of Governors Liaison (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, 2024 (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 Co-Chair | Perkins Coie |
| Daniel Ng | | daniel.ng@dechert.com | Transactional Tax Co-Chair | Dechert LLP |
| Najja O. Bullock | | Najja.O.Bullock@irs.counsel.treas.gov | 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 |
| Sofia Meglioli | 206-716-6529 | smeglioli@deloitte.com | CLE Co-Chair | Deloitte Tax LLP |
| 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 |
| Jessica Bejerea | (206) 484-8253 | jessica.bejerea@outlook.com | DEI 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 |
| Darek Jarski | 206-333-0750 | djarski@jarskilaw.com | At-Large | Jarski Law PLLC |
| 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 |
| 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 |