

# WASHINGTON STATE BAR ASSOCIATION

## WSBA ENTITY ANNUAL REPORT

FY 2021: October 1, 2020 – September 30, 2021

*The mission of the Washington State Bar Association is to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice.*

**Instructions:** In accordance with the WSBA Bylaws, Committees, Other Bar Entities (excluding Regulatory Boards<sup>1</sup>), Councils, and Sections must submit an annual report to the Executive Director. The information below should reflect the activities and outcomes from the fiscal year October 1, 2020 – September 30, 2021. Information in the annual report will be provided to the Executive Director and Board of Governors, and may be published for other purposes, such as *Bar News*, volunteer recruitment messaging, and other WSBA activity-based reporting.

It is recommended that completion of the annual report be a collaborative effort with members of your entity, the BOG liaison, and staff liaison.

**Submission Deadline is Friday, December 3:** please submit by emailing to Sections Program Specialist Carolyn MacGregor [carolynm@wsba.org](mailto:carolynm@wsba.org).

<b>Name of Entity:</b>	WSBA Taxation Section
<b>Chair or Co-Chairs:</b>	Claire Taylor
<b>Staff Liaison:</b> <i>(include name, job title, and department if known)</i>	Carolyn MacGregor
<b>Board of Governors Liaison:</b>	Click or tap here to enter text.
<b>Purpose of Entity:</b> <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
The purposes of the Section are to further the knowledge of the members and the Bar in areas of the law involving federal, state, and local taxation, and to assist in the activities of WSBA and further the interests of the legal profession.	
<b>Strategy to Fulfill Purpose:</b>	
We strive to host events providing member benefit, whether for networking, for further continued legal education on a variety of tax topics, by offering scholarships, and furthering relationships among private practitioners and government attorneys.	
<b>How does the entity’s purpose help further the mission of the WSBA “to serve the public and the members of the Bar, to ensure integrity of the legal profession, and to champion justice”?</b>	

We work to provide CLEs for all members on a variety of topics, we support the tax clinics with donations which furthers representation for low income taxpayers in WA and helps provide training for LLM students, we encourage member volunteer work with the federal tax clinics, and we continue to sponsor the Tax Section scholarship to promote opportunities for law students seeking to practice in the tax field in Washington. The structure of the Tax Section also encourages collaboration, with the co-chair model, and partnering government practitioners with private practitioners on both the state and federal side.

**2020-2021 Entity Accomplishments:**

The Taxation Section established a new Diversity, Equity, and Inclusion Chair Position and Committee for the Executive Council; we successfully operated subcommittees during the COVID-19 pandemic; we revised the mission statements and goals for all Taxation Section committees, which are now finalized and ready for the Taxation Section’s website; the Taxation Section awarded a \$5,000 scholarship to a student pursuing an LLM degree; the Taxation Section sponsored a virtual outreach event for young lawyers with a panel of experienced tax practitioners sharing their career paths and nature of their practices. Sub-committees held a variety of discussions on topics ranging from international tax updates to estate and gift new and proposed legislation, etc.

**Looking Ahead: 2021-2022 Top Goals & Priorities:**

- |          |   |
|----------|---|
| <b>1</b> | <b>Increase engagement with Section members by holding networking events (hopefully in-person in 2022)</b>  |
| <b>2</b> | <b>Provide Section members with mini-CLEs and other CLE opportunities regarding emerging issues and practical topics</b>                                    |
| <b>3</b> | <b>Sponsor DEI-focused CLE for Taxation Section members</b>   |
| <b>4</b> | <b>Encourage young tax attorneys in law school or pursuing LLMS by providing stipends to fund unpaid summer internship/externship work in tax positions</b> |
| <b>5</b> | <b>Increase pro bono service and involvement in low income taxpayer clinics and explore other avenues for similar service.</b>                              |

**Please report how this entity is addressing diversity, equity, and inclusion:**

*How have you elicited input from a variety of perspectives in your decision-making? What have you done to promote a culture of inclusion within the board or committee? What has your committee/board done to promote equitable conditions for members from historically underrepresented backgrounds to enter, stay, thrive, and eventually lead the profession? Other?*

The Taxation Section created a new Executive Council position for a Diversity, Equity, and Inclusion committee chair. We have two new co-chairs and they are in the process of creating a CLE for Taxation Section members, and an event for the Tax Section EC. We encourage young lawyers and any Tax Section members to apply for and participate in the Tax Section committees and events.

**Please describe the relationship with WSBA staff and the Board of Governors.**

*For example:*

- *Quality of WSBA staff support/services*

- *Involvement with Board of Governors, including assigned BOG liaison*
- *Ideas you have on ways WSBA can continue to strengthen/support your entity.*

We have had limited interaction with the BOG liaison but have felt supported by the WSBA staff who are available to answer questions and provide guidance.

**SECTIONS ONLY: Please quantify your section's 2020-2021 member benefits:**

*For example:*

- *\$3000 Scholarships, donations, grants awarded;*
- *4 mini-CLEs produced*

Click or tap here to enter text.	Newsletters/publications produced
3	Mini-CLEs produced
Click or tap here to enter text.	Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA
Click or tap here to enter text.	Co-sponsored half-day, full-day and/or multi-day CLE seminars with <i>non</i> -WSBA entity
1	Receptions/forums hosted or co-hosted (Virtual)
1	Recognitions/Awards given (Scholarship--\$5,000)
1	New Lawyer Outreach events/benefits (Virtual)
Click or tap here to enter text.	Other (please describe): Donations to low income taxpayer clinics (\$2,000 each)

**Entity Detail Report:  
To Be Completed by WSBA Staff**

<b>Size of Entity:</b>	23
<b>Membership Size: (for Sections Only)</b> <i>(As of September 30, 2021)</i>	628
<b>Number of Applicants for FY22 Positions</b> <i>(October 1, 2021 – September 30, 2022)</i>	22 (including Young Lawyer Liaison)
<b>How many current volunteer position vacancies for this entity?</b>	0
<b>FY21 Revenue (\$): For Sections Only:</b> <i>As of September 30, 2021</i>	\$9,837

**Direct Expenses:**

*As of September 30, 2021. For Sections, this does not include the Per-Member-Charge.*

\$1,724

---

<sup>i</sup> The Access to Justice Board (not regulatory, but applicable to the distinction herein) and Regulatory Boards (Disciplinary Board, LLLT Board, Limited Practice Board, MCLE Board and Practice of Law Board) are not required by Bylaws or Court Rule submit an annual report to WSBA. However, as part of the administration of monitoring of Regulatory Boards, the Boards listed herein typically provide an annual report to the Court and WSBA should be provided this same report an annual basis.