

WASHINGTON STATE BAR ASSOCIATION

WSBA SECTION ANNUAL REPORT

FY 2024: October 1, 2023 – September 30, 2024

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^j), 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, 2023 – September 30, 2024. 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, October 11: please submit by emailing to Carolyn MacGregor (carolynm@wsba.org).

Name of Section:	Elder Law Section
Chair or Co-Chairs:	Ronald St. Hilaire
Staff Liaison: (include name, job title, and department if known)	Carolyn MacGregor, Sections Program Specialist, Advancement Department
Board of Governors Liaison:	Brent Williams-Ruth
Purpose: <i>May be stated in Bylaws, Charter, Court Rule, etc.</i>	
Improve WSBA members' understanding of the legal needs of older adults in Washington; (2) Create a cooperative structure through which WSBA members can work together to better understand Elder Law issues and effective problem solving approaches; (3) Provide legal assistance to older adults in Washington; (4) Serve as a liaison between the WSBA, BOG, Section members and other organizations serving older adults; and (5) Facilitate opportunities for research, advocacy and publications in the field of Elder Law.	
Strategy to Fulfill Purpose:	
The Elder Law Section: (1) hosts regular CLE programs on issues impacting older adults; (2) monitors legislation impacting older adults and shares information with members; (3) maintains an active listserv for section members to collaborate and consult on elder law issues; (4) holds monthly meetings for the executive committee that include the WSBA staff liaison and BOG liaison; and (5)	

sponsors a summer intern to provide legal assistance to low-income seniors at a nonprofit legal aid organization.	
How does the section'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"?	
The Section provides legal education, advice and consultation, and legislative updates with members. The Section sponsors a legal intern to provide free legal services at a nonprofit legal services organization.	
Top 2023 -2024 Section Accomplishments:	
Hosted spring CLE April 5, 2024 covering annual legislative update, community and separate property in conservatorship proceedings, financial exploitation of the elderly, and recent RPC amendments.	
Sponsored a summer intern to provide legal assistance to low-income seniors at a nonprofit legal aid organization.	
Monitored legislation impacting older adults, shared legislative information with members, and provided comment to the legislature when necessary	
Hosted fall CLE September 13, 2024 covering entity transition upon death, advising trustee of special needs trust, mental illness, AI, and prospectives from a professional fiduciary.	
Next Fiscal Year: 2024-2025 Top SMART Goals & Priorities: <i>Tip: SMART Goals are: Specific Measurable, Relevant and Time-Bound</i> Use this worksheet (under 'Leadership') to develop your SMART goals and then summarize below in 1-2 sentences.	
1	Host 2 CLEs, one in spring and one in fall
2	Maintain vibrant section listserv for mentorship, collaboration, and consultation
3	Sponsor legal intern at non-profit legal aid organization for summer 2025
Looking Ahead: <i>Please share any long-term goals and/or priorities that your entity aims to address.</i>	
1	Monitor legislation impacting older adults and engage Section members in legislative information-sharing and comment when appropriate
2	Collaborate with WSBA, BOG and Washington State Bar Foundation to achieve goals
3	
Please describe how this entity is addressing diversity, equity, and inclusion: <i>How have you elicited input from a variety of perspectives in 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 in the profession? Other?</i>	

<p>The Section sponsors a legal intern to work with a Washington legal services organization. Internships at legal services organizations are traditionally unpaid, which means the intern must have a separate source of income or support to participate. Therefore, these internships are not available to many students and disproportionately unavailable to BIPOC students. Sponsorship by the Section opens the opportunity to all students and encourages a more diverse and inclusive pool of applicants. In addition, the Section leadership has regular discussion about strategies for making the Section open and available to all WSBA members in an effort to create a more diverse and inclusive Section.</p>		
<p>Please share feedback regarding the support and engagement provided by WSBA. <i>For example:</i></p> <ul style="list-style-type: none"> • <i>Quality of WSBA staff support/services, including technology solutions</i> • <i>Involvement with Board of Governors, including assigned BOG liaison</i> • <i>Ideas you have on ways WSBA can continue to strengthen/support your entity.</i> 		
<p>The Section has a good working relationship with liaisons from WSBA, BOG and Washington State Bar Foundation. Our liaisons have been very involved in Section activities and business and extremely helpful to Section leaders.</p>		
<p>Please quantify your section's 2023-2024 member benefits: <i>For example:</i></p> <ul style="list-style-type: none"> • <i>\$3000 Scholarships, donations, grants awarded;</i> • <i>4 mini-CLEs produced</i> 		
2	Co-sponsored half-day, full-day and/or multi-day CLE seminars with WSBA	
0	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	
	\$ amount given through donations/scholarships/grants.	
0	Newsletters/publications produced	
0	Mini-CLEs produced	
0	New Lawyer Outreach events/benefits	
0	Recognitions/Awards given	
	Other (please describe):	
<p align="center">SECTION DATA <i>To Be Completed by WSBA Sections Team</i></p>		
Section Membership Information:	611	Membership Size: (As of September 30, 2024)

Sections

	\$38,917		FY24 Revenue (\$): For Sections Only: <i>As of September 30, 2024</i>
	\$47,270	\$789	Budgeted and Direct Expenses: <i>Does not include the Per-Member-Charge. For Direct Expenses, draft estimate as of December 3, 2024.</i>
Section Executive Committee Information:	15		Size of Executive Committee: <i>(include and specify voting and non-voting positions)</i>
	11		Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25).</i>
	14		Number of Applicants for FY25: <i>Applications submitted in the Spring-Summer of 2024 for terms beginning October 1, 2024 (FY25)</i>

ⁱ Supreme Court Boards (Access to Justice Board, Disciplinary Board, LLLT Board, Limited Practice Board, MCLE Board and Practice of Law Board) provide annual reports to WSBA to support its responsibility under [GR 12.3](#), to provide oversight and monitor compliance with applicable rules and orders. Boards have the option to use the WSBA template or to share their annual reports to the Washington Supreme Court.