

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:	WSBA Taxation Section
Chair or Co-Chairs:	Megan Tahl
Staff Liaison: (include name, job title, and department if known)	Carolyn MacGregor, Sections Program Specialist, Advancement Department
Board of Governors Liaison:	Nam Nguyen (District 10)
Purpose: <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.	
Strategy to Fulfill Purpose:	
We strive to host events providing member benefit, whether for networking, for further continued legal education on a variety of tax topics. The section offers scholarships, and the ability to further relationships among private practitioners and government attorneys.	
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"?	

<p>We work to provide CLEs for all members on a variety of topics. We also 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.</p>	
<p>Top 2023 -2024 Section Accomplishments:</p>	
<p>The Taxation Section has continued to build out the Diversity, Equity, and Inclusion Chair Committee and activities for the Executive Council. This increased investment in DEI has allowed our members to continue to learn and grow in their DEI knowledge. Part of this expansion is the PATH mentorship program which became a reality during the 2023/2024 fiscal year.</p>	
<p>We expanded the Taxation section website to include more information and opportunities for members;</p>	
<p>The Taxation Section awarded a \$5,000 scholarship to a student pursuing an LLM degree;</p>	
<p>Sub-committees held a variety of discussions and meetings on topics ranging from international tax updates to estate and gift planning legislation.</p>	
<p>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.</p>	
1	Increase engagement with Section members by holding networking events
2	Sponsor DEI-focused CLE for Taxation Section members
3	Increase pro bono service and involvement in low-income taxpayer clinics and explore other avenues for similar service.
<p>Looking Ahead: <i>Please share any long-term goals and/or priorities that your entity aims to address.</i></p>	
1	Expand the PATH mentorship program for young tax professionals.
2	Reintroduce the half-day mini CLE for taxation section members. This CLE will cover emerging issues and practical topics
3	
<p>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>	

<p>The Taxation Section expanded our DEI activities with the help of our DEI committee and chair. We have implemented the PATH mentorship program for young tax professionals. Our intention is to expand this program to college and high school individuals. We are also hosting additional events and CLE focused in the area of DEI and further expanding the website to provide resources in the area of DEI.</p>		
<p>Please share feedback regarding the support and engagement provided by WSBA.</p> <p><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>Carolyn MacGregor and Noah Baetge are extremely helpful as liaisons to the WSBA. As we further our DEI efforts, they have guided us regarding WSBA policies and practices. We would support any additional activities to promote the section via the overall WSBA and we are pleased with the expansion of the Taxation Section website.</p>		
<p>Please quantify your section's 2023-2024 member benefits:</p> <p><i>For example:</i></p> <ul style="list-style-type: none"> • <i>\$3000 Scholarships, donations, grants awarded;</i> • <i>4 mini-CLEs produced</i> 		
0	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.	
2	Receptions/forums hosted or co-hosted	
\$9,000 (\$5,000 scholarship and \$2,000 to each of the tax clinics.)	\$ amount given through donations/scholarships/grants.	
0	Newsletters/publications produced	
1	Mini-CLEs produced	
	New Lawyer Outreach events/benefits	
1	Recognitions/Awards given	
	Other (please describe):	
<p align="center">SECTION DATA</p> <p align="center"><i>To Be Completed by WSBA Sections Team</i></p>		
Section Membership Information:	610	Membership Size: (As of September 30, 2024)
	\$18,030	FY24 Revenue (\$):

Sections

			For Sections Only: <i>As of September 30, 2024</i>
	\$38,500	\$16,453	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:	25		Size of Executive Committee: <i>(include and specify voting and non-voting positions)</i>
	29		Number of Vacancies for FY25: <i>The number of positions with terms beginning October 1, 2024 (FY25).</i>
	22		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.