

Northwest Montana Estate Planning Council
Member Meeting Minutes
November 29, 2025, 5:30 – 7:30 p.m.
Grouse Mountain Lodge, Whitefish, Montana

Members Present:	Brad Corntassel, Bridger Dolan, Aaron Ells, Kelly O'Brien, Connie Page, Grant Snell, Addison Vergara, Craig Woods, Brant Beaudry, Bryan Goodfried, David Wigginton, Brian Tanko, Jennifer Crowley, Johanna Pickel, Katy Lee, Brigand Kline, Maggie Volk, Sarah Gould, Scott Maitland,
Guests:	Liz Scholten, Melissa Lipscomb, Steve Stahlberg

<i>Topic</i>	<i>Discussion</i>	<i>Conclusions/Actions/ Recommendations/, Motions</i>	<i>Follow Up</i>
Opening Remarks	<ol style="list-style-type: none"> President Aaron Ells opened the meeting. Members were reminded to pay their 2026 dues. Members and guests introduced themselves. 		
Secretary Report	<ol style="list-style-type: none"> Secretary Grant Snell presented the September 17, 2025 meeting minutes for review and approval by the Members. New members were announced: Sarah Gould - Elevated Advisory and Accounting (Affiliated Industry); Katy Lee - Eclipse Tax & Accounting, Inc. (CPA); Maggie Volk - Crowley Fleck PLLP (Emerging Professional); Brigand Kline - Mission Trails Financial (CFP) 	<ol style="list-style-type: none"> A motion was made and seconded to approve the past meeting minutes; the motion passed unanimously. A motion was made and seconded to approve the new members; the motion passed unanimously 	
Treasurer Report	<ol style="list-style-type: none"> With new members, the association is in good shape financially headed into 2026. 		
New Business	<ol style="list-style-type: none"> The following board members were approved for new terms: David Wigginton (filling Michelle Clary seat); Katy Lee (filling Bryson Pelc seat). 	<ol style="list-style-type: none"> A motion was made and seconded to approve the new board members; the motion passed unanimously 	

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	<p>The remaining board members maintain their seats: Aaron Ells, Kelly O'Brien, Grant Snell, Craig Woods, and Connie Page</p>		
Sponsor Recognition	<p>1. Johanna Pickel provided an overview of the Pickel Law Firm.</p>		
Speaker	<p>1. Scott Maitland spoke about estate planning for business owners.</p>		
Adjourn	<p>1. The meeting was adjourned.</p>		