

Northwest Montana Estate Planning Council
Member Meeting Minutes
May 20, 2026, 5:30 – 7:00 p.m.
Grouse Mountain Lodge, Whitefish, Montana

Members Present:	Maggie Volk, Zach Barber, Brant Beaudry, Bridger Dolan, Erika Dorrington, Aaron Ells, Peal Galbraith, Andy Kirk, Katy Lee, Kelly McMahon O'Brien, Connie Page, Brad Corntassel, Liz Scholten, Shay Smithwick-Hann, Grant Snell, Addison Vergara, Alan Davis, Lynnette Donaldson, Denise Romer, Scott Maitland, Thomas Miller
Guests:	Chris Lyle and Becky Fink (Davidson Trust Company, Speakers), Adrianna Douglas (Timber & Trust Estate Sales), Timea Parker (PAS Consulting)

<i>Topic</i>	<i>Discussion</i>	<i>Conclusions/Actions/ Recommendations/ Motions</i>	<i>Follow Up</i>
Opening Remarks	1. President Aaron Ells opened the meeting. 2. Members introduced themselves.		
Secretary Report	1. Secretary Grant Snell presented the March 18, 2026 meeting minutes for review and approval by the Members. 2. The Council has been approved as a continuing legal education provider by the Montana State Bar, and the Council will plan to apply for CLE for attorney members when possible.	1. A motion was made and seconded to approve the past meeting minutes; the motion passed unanimously.	
Treasurer Report	1. President Aaron Ells gave a brief treasurer report as treasurer Craig Woods was absent. The council has 34 members and is on-track with its budget but should focus on attracting more members at the September meeting for cushion.		
New Business	None		

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Sponsor Recognition	1. Kelly McMahon O'Brien provided an overview of legal planning services at Measure Law.		
Speaker	1. Chris Lyle and Becky Fink with Davidson Trust Company spoke about trusts as IRA beneficiaries, and administering estates v. trusts.		
Adjourn	1. The meeting was adjourned.		