

Northwest Montana Estate Planning Council
Member Meeting Minutes
March 18, 2026, 5:30 – 7:30 p.m.
KM Steakhouse, Kalispell, Montana

Members Present:	Jasmine Baier, Zach Barber, Brant Beaudry, Gage Blatter, Michelle Clary, Bridger Dolan, Erika Dorrington, Aaron Ells, Peal Galbraith, Sarah Gould, Cody Kirk, Andy Kirk, Katy Lee, Jodon Montgomery, Kelly O'Brien, Connie Page, Brad Corntassel, Liz Scholten, Shay Smithwick-Hann, Grant Snell, Brian Tanko
Guests:	

<i>Topic</i>	<i>Discussion</i>	<i>Conclusions/Actions/ Recommendations/ Motions</i>	<i>Follow Up</i>
Opening Remarks	<ol style="list-style-type: none"> 1. President Aaron Ells opened the meeting. 2. Members introduced themselves. 		
Secretary Report	<ol style="list-style-type: none"> 1. Secretary Grant Snell presented the January 21, 2026 meeting minutes for review and approval by the Members. 2. New members were announced: Pearl Galbraith – Edward Jones (Financial Planning) 	<ol style="list-style-type: none"> 1. A motion was made and seconded to approve the past meeting minutes; the motion passed unanimously. 2. A motion was made and seconded to approve the new members; the motion passed unanimously 	
Treasurer Report	<ol style="list-style-type: none"> 1. Members were reminded to pay their dues. 		
New Business	None		

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Sponsor Recognition	1. Michelle Clary provided an overview of financial planning services at Piton Wealth.		
Speaker	1. Grant Snell spoke about estate planning strategies for high new worth individuals.		
Adjourn	1. The meeting was adjourned.		