

Northwest Montana Estate Planning Council
Member Meeting Minutes
May 21, 2025, 5:30 – 7:30 p.m.
Grouse Mountain Lodge, Whitefish, Montana

Members Present:	Brad Corntassel, Jennifer Crowley, Bridger Dolan, Erika Dorrington, Aaron Ells, Kelly O'Brien, Connie Page, Denise Romer, Grant Snell, Addison Vergara, Craig Woods, Laurie Marburger (Tanko Law), Bryson Pelc, Cody Kirk, Liz Scholten, Michelle Clary, Shay Smithwick-Hann, Zach Barber
Guests:	Brant Beaudry, Leanna Beaudry

<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 and guests introduced themselves. 3. Aaron announced the membership drive for the September 2025 meeting with the goal of reaching 30 members. Members are encouraged to bring a guest at no additional cost. 4. Aaron encouraged members to sign up for the webinars offered by the national Estate Planning Council. 		
Secretary Report	<ol style="list-style-type: none"> 1. Secretary Grant Snell presented the March 19, 2025 meeting minutes for review and approval by the Members. 	<ol style="list-style-type: none"> 1. A motion was made by Addison Vergara to approve the past meeting minutes; the motion was seconded by Connie Page; the motion passed unanimously. 	
Treasurer Report	<ol style="list-style-type: none"> 1. Treasurer Bryson Pelc explained that the council needs 30 members for budget purposes to maintain the current level of expenses before dipping into reserves. 		
Sponsor Recognition	<ol style="list-style-type: none"> 1. Bryson Pelc discussed Jordahl & Sliter as the meeting sponsor and announced the Brad Corntassel is now a partner with Jordahl & Sliter. 		

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Speaker	1. Erika Dorrington and Zach Barber with DA Davidson spoke about estate planning from the financial advisor's perspective and gave a market update.		
Adjourn	1. The meeting was adjourned.		