

**Northwest Montana Estate Planning Council**  
**Member Meeting Minutes**  
**September 17, 2025, 5:30 – 7:30 p.m.**  
**Grouse Mountain Lodge, Whitefish, Montana**

<b>Members Present:</b>	Brad Corntassel, Bridger Dolan, Aaron Ells, Kelly O'Brien, Connie Page, Denise Romer, Grant Snell, Addison Vergara, Craig Woods, Bryson Pelc, Brant Beaudry, Michelle Clary, Shay Smithwick-Hann, Zach Barber, Alan Davis, Bryan Goodfried, David Wigginton, Jasmine Morton, Krystalynn Schlegel, Rosella Saucier
<b>Guests:</b>	Liz Scholten, Daria Perez, Gatlin Bruner, Jenn Prunty, John Dudis, Katy Lee, Maggie Volk, Michael Cavaliere, Sara Gould, Shawn Saucier

<i><b>Topic</b></i>	<i><b>Discussion</b></i>	<i><b>Conclusions/Actions/ Recommendations/ Motions</b></i>	<i><b>Follow Up</b></i>
Opening Remarks	<ol style="list-style-type: none"> <li>1. President Aaron Ells opened the meeting.</li> <li>2. Members and guests introduced themselves.</li> <li>3. Alan Davis with the Whitefish Community Foundation announced an upcoming webinar.</li> </ol>		
Secretary Report	<ol style="list-style-type: none"> <li>1. Secretary Grant Snell presented the May 21, 2025 meeting minutes for review and approval by the Members.</li> <li>2. New members were announced: Rosella Saucier with the American Cancer Society and Brant Beaudry with Snyder, Beaudry &amp; Cook</li> <li>3. Proposed slate of new board members to be voted on at the next meeting: David Wigginton to replace Michelle Clary, Kelly O'Brien to retain her seat, Craig Woods to replace Bryson Pelc as treasurer. Board members with 1 year remaining: Aaron Ells, Grant Snell, and Connie Page.</li> </ol>	<ol style="list-style-type: none"> <li>1. A motion was made and seconded to approve the past meeting minutes; the motion passed unanimously.</li> </ol>	
Treasurer Report	<ol style="list-style-type: none"> <li>1. Treasurer Bryson explained that 3 additional members are required this year before the council starts to use its reserve funds.</li> </ol>		

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Sponsor Recognition	1. Michelle Clary provided an overview of Piton Wealth.		
Speaker	1. Mike Cavaliere with the Cavaliere Law Firm, LLC spoke about irrevocable trusts.		
<b>Adjourn</b>	1. The meeting was adjourned.		