

**Northwest Montana Estate Planning Council
Member Meeting Minutes
January 15, 2025, 5:30 – 7:30 p.m.
Grouse Mountain Lodge, Whitefish, Montana**

Members Present:	Zach Barber, Marija Berney, Brad Corntassel, Jennifer Crowley, Alan Davis, Bridger Dolan, Erika Dorrington, Aaron Ells, Scott Maitland, Kelly O'Brien, Connie Page, Denise Romer, Grant Snell, Addison Vergara, Craig Woods
Guests:	Ben Hammer, Daria Perez, Liz Scholten, Jared Zuege

<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. The President invited members to provide ideas for 2025 speakers. 		
Secretary Report	<ol style="list-style-type: none"> 1. New members Brian Tanko, Denise Romer, Krystalynn Schlegel, Thomas Miller, and Bridger Dolan were recognized. 2. Secretary Grant Snell presented the November 2024 meeting minutes for review and approval by the Members. 	<ol style="list-style-type: none"> 1. A motion was made by Craig Woods to approve the meeting minutes; the motion was seconded by Connie Page; the motion passed unanimously. 	
Treasurer Report	<ol style="list-style-type: none"> 1. Aaron Ells gave the treasurer report compiled by Bryson Pelc who was absent. 2. Review of speaker sponsors for 2025 and reminder to members to pay dues. 3. For 2024, the Council had \$14,148 of income, \$6,253.09 of expenses, and \$7,894.91 of net income. 		
Sponsor Recognition	<ol style="list-style-type: none"> 1. Kelly O'Brien discussed Measure Law as the meeting sponsor. 		

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Speaker	1. Alan Davis with the Whitefish Community Foundation discussed the organization and the various charitable giving tools the organization provides.		
Adjourn	1. The meeting was adjourned.		