

**Northwest Montana Estate Planning Council**  
**Member Meeting Minutes**  
**March 20, 2024, 5:30 – 7:30 p.m.**  
**Basement Meeting Room, National Parks Realty, Whitefish, Montana**

<b>Members Present:</b>	Aaron Ells, Connie Page, Grant Snell, Kelly O'Brien, Jennifer Crowley, Shay Smithwick-Hann, Zach Barber, Addison Vergara, Cody Kirk, Craig Woods, Deborah Pearson, Bryson Pelc, Brad Corntassel, Johanna Pickel, Daria Perez, Alan Davis, Bryan Goodfried, Marija Berney, Erika Dorrington
<b>Guests:</b>	Krystalynn Schlegel, Scott Maitland

<i>Topic</i>	<i>Discussion</i>	<i>Conclusions/Actions/ Recommendations/ Motions</i>	<i>Follow Up</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. The President reviewed the mission and purpose of the organization as well as the website and associated benefits.</li> </ol>		
Meeting Minutes	<ol style="list-style-type: none"> <li>1. The Secretary, Grant Snell, announced the new members: Marija Berney, Craig Woods, Bryan Goodfried, Jesse Rigler, Cody Kirk, Brad Corntassel, and David Wiggington</li> </ol>	<ol style="list-style-type: none"> <li>1. A motion was made by Kelly O'Brien to approve the meeting minutes for the January 17, 2024 meeting; the motion was seconded by Craig Woods; the motion passed unanimously.</li> </ol>	
Treasurer Report	<ol style="list-style-type: none"> <li>1. Treasurer Bryson Pelc gave an update on paying dues via the website.</li> </ol>		
Sponsor Recognition	<ol style="list-style-type: none"> <li>1. Bryson Pelc discussed his accounting firm Jordahl &amp; Sliter as the meeting sponsor.</li> </ol>		

**Northwest Montana Estate Planning Council**

**Member Meeting Minutes**

**March 20, 2024, 5:30 – 7:30 p.m.**

**Basement Meeting Room, National Parks Realty, Whitefish, Montana**

Speaker	1. Jennifer Crowley spoke about the life care planning process.		
<b>Adjourn</b>	1. The meeting was adjourned.		

**Northwest Montana Estate Planning Council  
Member Meeting Minutes  
March 20, 2024, 5:30 – 7:30 p.m.  
Basement Meeting Room, National Parks Realty, Whitefish, Montana**