

Northwest Montana Estate Planning Council
Member Meeting Minutes
November 20, 2024: 5:30 – 7:30p.m.
Wine Tasting Room, Grouse Mountain Lodge

Members Present: Zach Barber, Jennifer Crowley, Alan Davis, Erika Dorrington, Aaron Ells, Cody Kirk, Christina Larsen, Jared Venge, Connie Page, Bryson Pelc, Addison Vergara, Craig Woods, Kelli O'Brien,

Guests: Camisha Booth Sawtelle, Zachary Malinak, Daria Perez, Krystalynn Schlegel, Liz Scholten, Brian Tanko

- Opening Remarks:
 - President Aaron Ells opened the meeting
 - Members and guest introduced themselves- members were asked to vote for their choice to win the Cat/Griz game. Griz=9 votes, Bobcats=7 votes, 4 members abstained.
 - 2025 Dues- found on website, please pay through website
 - RSVP – Please rsvp for all upcoming meeting so we have an accurate count.
- Secretary Report:
 - Aaron Ells – filled in for Grant Snell and read the September minutes
 - Motion was made to approve, second was made, minutes were approved
- Treasurer Report
 - Bryson Pelc read the treasurer report, presented the 2025 proposed budget
 - Motion was made to approve, second was made, treasurers report was approved
- New Business:
 - Aaron Ells read the changes to the bylaws, everyone present was given a copy of the updated bylaws.
 - Motion was made to approve, second was made, changes to bylaws were approved
 - Aaron Ells read off the board members slate- new board members were unanimously approved. 2024 board members are: Craig Woods, Connie Page, Aaron Ells, Grant Snell, Kelly Obrien, Bryson Pelc, Michelle Clary.
- Guest Speaker: Kelly O'Brien, Measure law: Kelly spoke on Year-End Estate Planning for the 2025 Estate and Gift Tax Exemption Sunset:
- Adjourn: The Meeting was adjourned.