

NEWS RELEASE

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Northwest Montana Estate Planning Council Launches with First Meeting, Even in a Blizzard

For Immediate Release

Kalispell, Montana – January 18, 2024 – “It was our very first meeting, there was a blizzard, and we still had a great turnout and a fantastic meeting,” says Aaron Ells, a Wealth Advisor in Kalispell at Piton Wealth and President of the newly inaugurated Northwest Montana Estate Planning Council, “so I think we’re off to a tremendous start!” After more than a year of planning, the Council held its first ever meeting on January 17, 2024, at National Park Realty in Whitefish.

An Estate Planning Council is a non-profit organization that brings together professionals who work in some aspect of estate planning, so that they can learn from each other and collaborate more often (Those seeking to learn more about membership can visit nwmontanaestateplanning.org for details.). Ells again: “Anyone who’s been involved in any estate knows how many different professionals are involved, so a Council like this means that all those professionals already know each other and can work together better when making plans and then when it comes time to execute those plans. It’s a win-win for the professionals, for the clients that they serve, and in that way for the whole regional community.” Members of Estate Planning Councils typically include attorneys, financial specialists, health care administrators, and more. This recent meeting featured a pair of Certified Public Accountants from JCCS Accounting, Lana Kadoshnikov and Marija Berney, speaking on “Three Practical Considerations of Pass-Through Entity Tax for Estates and Trusts.” For the members, the connections and benefits will continue and grow long-term. The new council will meet every quarter, but they also form the local chapter of the National Association of Estate Planners and Councils, so that members have a way to find and connect with estate planners all over the country. “That’s really what it’s all about,” concludes Ells with a smile, “when someone in the region needs these kinds of services, and they experience the collaboration of all these different kinds of professional specialists and feel like it all works smoothly. It’s Montana, so we’ll have more snowstorms, but we’ll have more great meetings and keep connecting better and better.”

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