MARSHA A. GOETTING

2009

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EDUCATION

- **Doctor of Philosophy**. Department of Human Development and Family Studies, Iowa State University, Ames, May 1996. Major: *Family Resource Management*, Minor: *Gerontology*, Dissertation: *Older Adults, Bequests, and Wills.*

- **Master of Science Degree: Education**. Kansas State University, Manhattan, December 1973. Major: *Adult Education*

- **Master of Science Degree: Home Economics**. Kansas State University, Manhattan, May 1973. Major: *Family Economics*

- **Bachelor of Science Degree: Home Economics**. Kansas State University, Manhattan, December 1971. Major: *Consumer Interests*

EMPLOYMENT HISTORY

- **Professor, MSU Extension Family Economics Specialist:** (July 1992 to present); Extension Service, Department of Agricultural Economics and Economics, Montana State University, Bozeman, MT. Responsibilities: Provide a statewide family financial education and information to Montana citizens that will enable them to improve their quality of life. Collaborate with County Extension faculty, Agricultural Economics and Economics faculty, faculty from other disciplines, and legal and tax professionals in the development and evaluation of programs in communities as well as publications that are available from MSU and county offices. Seek funding for needed programs.

- **Graduate Research Assistant:** (.25), (August 1992-May 1995). Department of Human Development and Family Studies; Iowa State University, Ames, Iowa. Responsibilities: Conduct literature searches, copy research articles in library, input data, conduct computer analysis of data and co-author articles.

- **Associate Professor, MSU Extension Family Economics Specialist:** Extension Service, Department of Agricultural Economics and Economics (July 1987-June 1992). Montana State University, Bozeman, MT.

- **Assistant Professor, State Consumer Education Specialist:** Cooperative Extension Service, Montana State University, Bozeman, MT, (April 1977-June 1987). Major Accomplishments: Developed "Estate Planning for Every Montanan," a ten-lesson study-at-home course, 26,000 participants; "Get a Grip on Your Money," a newspaper correspondence course with 2,900 enrollees offered by 39 counties; "Pickle Power," a new concept in decision making for youth with 1,100 participating; "Increasing Competencies of Limited Resource Families," federal grant and Tri-State Consortium grant; "Going Metric Without Going Mad," a nine-lesson study-at-home course with 3,100 participants; "Individual Retirement Accounts," a self-study packet containing 12 MontGuides, with 4,600 participants. Awarded grants totaling $12,000 from the State Bar of Montana for "Estate Planning for Every Montanan."

- **Assistant Professor, Area Consumer Education Specialist:** Cooperative Extension Service, Kansas State University, South Central Area Office, S. Hutchinson, KS, (March 1974-March 1977). Responsibilities: Conferred with 19 Extension Home Economists to develop Extension consumer education program. Major accomplishments: Developed food buying study-at-home course, 4,000 participants. Developed money management study-at-home course, 1,000 participants.

- **Instructor, Consumer Economics:** Kansas State Industrial Reformatory, Community College, Hutchinson, KS, (Summer 1975). Responsibility: Taught course for 40 inmates after the resignation of two instructors during the summer session.

- **Graduate Teaching Assistant:** College of Home Economics, Kansas State University, Manhattan, KS, (August 1972-May 1973). Responsibilities: Assisted with Introduction to Home Economics class. Advised 20 home economics freshmen, graded assignments, and presented lectures. Assisted with Family Finance class. Graded tests and students' budgets, operated visual equipment, presented lectures and determined grades. Taught food consumerism and personal finances classes at community colleges in Coffyville, Independence and Colby. Developed extensive proposal for consumer education class at Colby Community College.

- **Consumer Education** (Volunteer): Illinois State Penitentiary, Menard, IL, (Summer 1971). Responsibilities: Developed a consumer education course for residents of the prison. Conferred with administrative personnel and Inmate Advisory Council in the organizational process. This was the first consumer education course to be offered at the prison. One has been available every semester since that time.

HONORS AND AWARDS

National

- *Continued Excellence Award*, National Extension Association of Family & Consumer Sciences, September 2008.

- Regional Qualifying Program, Western Extension Director's Awards of Excellence, Planning for Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act (AIPRA) of 2004.

- Jeanne M. Priester Award, Montana Alzheimer Series, Goetting, M., Bailey, S., Paul, L., Vogel, M. et al., April 2007.

- MetLife Foundation Award, Goetting, M., Bailey S., Paul, L., Vogel, M. et al., Montana Alzheimer Series, Spring 2007.

- National Family Caregiving Award, Goetting, M., Bailey, S., Paul, L., Vogel, M. et al., Montana Alzheimer Series, Spring 2007.

- National Extension Association of Family and Consumer Sciences, Florence Hall Award, along with Vogel, Bailey, Lynn, Johnson, Oelkers, Friedrich, and Roos, October 2006.

- Educational Technology, Third Place, National Association of Family and Consumer Science (Glenn Muske and Vukonich), 2000.

Regional

- *First Place, Western Region, Mary Wells Diversity* Award (Passing Reservation Lands), National Extension Association of Family & Consumer Sciences, September 2008.

- *First Place, Western Region, Communication-Internet Technology* Award (Dying Without a Will in Montana), National Extension Association of Family & Consumer Sciences, September 2008.

- *Dean Don Felker Financial Management* Award along with six Extension Agents, Western Region National Extension Association of Family & Consumer Sciences, Get Smart About Credit, October 2006.

- National Extension Association of Family and Consumer Sciences, *Florence Hall* Award along with Vogel, Bailey, Lynn, Johnson, Oelkers, Friedrich, and Roos, October 2006.

- *Dean Don Felker Financial Management* Award ,Western Region National Extension Association of Family & Consumer Sciences, Teach Children to Save, October 2005.

- Southern Region, Educational Technology, National Association of Family and Consumer Sciences, (Muske and Vukonich), 2000.

- Western Region Financial Management Award, National Association of Extension Home Economists (NAEHE), (Mason), 1991.

- Western Region Communication and Media Award, Financial Management, (Pourroy), National Association of Extension Home Economists (NAEHE), 1990.

Iowa

- Research Excellence Award, Graduate College, Iowa State University, 1996

Oklahoma

- Website Development, Oklahoma Extension Association of Family and Consumer Sciences, 2000.

Montana

- President's Excellence in Outreach, 2006.
- "Excellence in Extension," Montana Association of Family & Consumer Sciences, April 2005.
- Distinguished Service Award, Montana Family & Consumer Sciences, 2003.
- Outstanding 4-H Alumnae, Montana 4-H Foundation, 2001.
- State Team Award, Epsilon Sigma Phi, EDUFAIM, 1999
- State Team Award, Epsilon Sigma Phi, with six Extension Agents and Specialists, 1996.
- Epsilon Sigma Phi Scholarship, Alpha Chapter, 1995.
- Montana Cooperative Extension Association Scholarship, 1995.
- Distinguished Service Award, Epsilon Sigma Phi, 1993.
- Distinguished Service Award, Montana Association of Extension Home Economists, 1993.
- State Team Award with Matta and Muggli, Epsilon Sigma Phi, 1993.
- State Team Award with Phillips and Garoutte, Epsilon Sigma Phi, 1992.
- Communication & Media Award, Financial Management with Mason, Montana Association of Extension Home Economists, 1991.
- Communication and Media Award, Financial Management with Pourroy, Montana Association of Extension Home Economists, 1990.
- Leader Award, American Home Economics Association, Montana Home Economics Association, 1988.
- Early Career Award, Epsilon Sigma Phi, 1987.
- Extension Worker of the Year, Silver Buffalo Award, Montana Cooperative Extension Association 1985.

PUBLICATIONS

Refereed Journal Articles

- DelGuerra, Claire, and Goetting, Marsha A. (January 2003). "Cremation: History, Process, and Regulations." The Forum for Family and Consumer Issues, Volume 8(1), pp. 1-6.

- Muske, Glenn, Goetting, Marsha A., and Vukonich, Merrylee (2001). "The World Wide Web: A Training Tool for Family Resource Management Educators." Journal of Extension. Volume 39(4), pp. 9-18.

- Goetting, Marsha A. (Spring 2001). "New State Laws: Opportunities for Collaboration." The Forum for Family and Consumer Issues. Volume 6(2), pp 1-9.

- Goetting, Marsha A., and Peter Martin (Fall 2001). "Characteristics of Older Adults with Written Wills." Journal of Family and Economic Issues. Volume 22(3), pp. 243-264.

- Goetting, Marsha A.; Martin, Peter; Johnson, Christine (2000). "Old Adults and Financial Bequests." International Journal of Aging and Human Development. Volume 50(3), pp 225-242.

- Goetting, Marsha A.; Raiser, Lorrie; Martin, Peter; Poon, Leonard and Johnson, Mary Ann (1996). "A Comparison of Older Women's Financial Resources and Perception of Financial Adequacy." Journal of Women and Aging. Volume 7(4), pp 67-81.

- Goetting, Marsha A.; Martin, Peter; Poon, Leonard and Johnson, Mary Ann (1996). "The Economic Well-Being of Community Dwelling Centenarians." Journal of Aging Studies. Volume 10(1), pp 43-55.

- Goetting, Marsha A. and Vicki Schmall. "Talking with Aging Parents about Finances." (Spring 1993). Journal of Home Economics. Volume 85,(1), pp. 42-46.

- Goetting, Marsha A. "Calculating Teens." (Summer 1992). Journal of Consumer Education. Volume 10, pp. 44-48.

- Goetting, Marsha A., and Raeann Pourroy. (Summer 1991). "Evaluation of an Interactive Newsletter Series—Getting It Together." Journal of Extension. Volume XXIX, pp. 16-19.

- Goetting, Marsha A., and Gayle Y. Muggli. (Spring 1988). "Made in Montana: Entrepreneurial Home Economics." Journal of Home Economics. Volume. 80(1), pp. 7-10.

- Wall, Ronald, and Marsha A. Goetting. (Summer 1987). "Calculating Extension Professionals Helping Folks with Finances." Extension Review. Volume 58(3), pp. 38-39.

- Goetting, Marsha A. (March/April 1984). "Pickle Power, Ad Scavenger Hunt, Consumer Sleuth, or Shopping Bag: Take Your Choice." Illinois Teacher. Volume XXVII(4), pp. 140-142.

- Goetting, Marsha A. (March/April 1982). "Pickle Power." Journal of Extension. Volume XX(2), p. 3.

- Goetting, Marsha A. (November/December 1981). "Home Study Courses: An Education Option." Journal of Extension. Volume XIX(4), pp. 14-18.

- Goetting, Marsha A. (Winter 1974). "Let's Put Consumer Education in Prison." Journal of Consumer Affairs. Volume 8(2), pp. 198-203.

Refereed Book Chapters and Others

- Book Review, "A No-Stress Guide to Becoming Financial Fit." Journal of Financial Counseling Planning, pp. 87 – 89, Volume 19 (2), 2008

- Schumacher, J., Goetting, M., Brennan, P., "FAQs on Health Care Savings Accounts." The Standard Association for Financial Counseling Planning and Education, Volume 25, Number 4, October 2007

- Goetting, Marsha A. (Summer 1996). "Stepfamilies and the Law." Book Review, Journal of Consumer Affairs. Volume 30(1), pp 269-272.

- Goetting, Marsha A. (1993). "Marketing Accountability of Home Economics." Chapter 20, Marketing Home Economics: Issues and Practices. American Home Economics Association, Washington, D.C.

- Goetting, Marsha A. (November 1990). "Women and Home-Based Work." Book Review, Journal of Home Economics. Volume 82(4), p. 54.

- Goetting, Marsha A. (October 1983). "Evaluating an Estate Planning Study-at-Home Course." Designing Studies of Extension Program Results: A Resource for Program Leaders and Specialists, USDA, Volume II, Denver, Colorado. USDA, pp. 21-22.

- Goetting, Marsha A. (Fall 1981). "Pickle Power, Ad Scavenger Hunt or Consumer Sleuth: Take Your Choice." American Council on Consumer Interests Forum XII(2), p. 6.

Refereed Conference Proceedings

- Goetting, Marsha A. (April 2007). "Dying Without a Will in Montana." National Extension Risk Management Education Conference, Phoenix, AZ.

- Goetting, Marsha A. (April 2007). "Planning for Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act of 2004, National Extension Risk Management Education Conference, Phoenix, AZ.

- Goetting, Marsha A. (April 2005). "Managing Property Title Risk for Montana Farm/Ranch Operators." Extension Risk Management Education Conference, Kansas City, MO.

- Cramer, Corinne and Goetting, Marsha A., (November 2003). "Track'n Your Savings Goals." Association for Financial Counseling and Planning Educators Conference Proceedings. Savannah, GA.

- Goetting, Marsha A., (November 2003). "Creating Financial Champions–Potpourri of Resources for Teaching Kids About Money". Association for Financial Counseling and Planning Educators Conference Proceedings. Savannah, GA.

- Haynes, Debby and Goetting, Marsha A., (November 2002). "Using Financial Calculators to Teach College Students Lessons about Credit Using a Peer Educator Model." Western Family Economics Educators Conference Proceedings. Scottsdale, AZ.

- Goetting, Marsha A. (October 2000). "Using Short Stories to Teach How Property Passes Upon Death of the Owner." Western Region Home Management Family Economics Educators Conference Proceedings. Denver, CO.

- Goetting, Marsha A. (November 1999). "Planning for the Passing of Land on Native American Reservations to Avoid Fractionation." Association for Financial Counseling and Planning Education Conference Proceedings. Phoenix, Arizona. pp. 169-177.

- Goetting, Marsha A. (February 1992). "Interactive Newsletter Series--An Evaluation." Southeastern Family Economics Conference Proceedings. Columbus, OH, pp. 149-154.

- Goetting, Marsha A. (October 1991). "Tracking Money the Easy Way." Association of Financial Counseling and Planning Education 1991 Proceedings. Kansas City, Kansas. pp. 160-168.

- Goetting, Marsha A., Mason, Bernice (September 1991). "How a Financial Calculator Can Help Secondary Students Make Decisions About Their Finances." National Rural Families Conference Proceedings. Kansas State University, Manhattan, Kansas. pp. 37-39.

- Goetting, Marsha A. (February 1991). "Montana's Women's Financial Management Program--An Evaluation." Conference Proceedings, Southeastern Family Economics Conference. Auburn, Alabama. pp. 339-347.

- Goetting, Marsha A. (February 1991). "Telelecture Inservice Education." Conference Proceedings, Southeastern Family Economics Conference, Auburn, Alabama. pp. 348-351.

- Goetting, Marsha A., Irene Hathaway, and Cherry Cowan. (November 1990). "Evaluation of Computerized Budget Analysis Program--DOLLAR WATCH." Conference Proceedings, Western Regional Home Management-Family Economics Educators Conference. Albuquerque, New Mexico. pp. 44-46.

- Goetting, Marsha A. (April 1984). "Evaluation of an Extension Learn-at-Home Series on Individual Retirement Accounts." Selected Proceedings, National Family Economics Extension Specialists' Workshop. Denver, Colorado. pp. 103-107.

- Goetting, Marsha A. (November 1982). "Estate Planning Evaluation--Montana." Conference Proceedings, 22nd Annual Western Regional Home Management-Family Economics Educators Conference. Portland, Oregon. pp. 62-64.

- Goetting, Marsha A. (November 1982). "The Economic Contribution of the Farm or Ranch Wife to the Agricultural Business." Conference Proceedings, 22nd Annual Western Regional Home Management-Family Economics Educators Conference. Portland, Oregon. pp. 65-68.

PRESENTATIONS

Refereed Paper Presentations

- Goetting, Marsha A. (October 2006), “Alzheimer’s Series,” National Association of Family & Consumer Sciences, Denver, CO.

- Goetting, Marsha A. (April 2005). “Managing Property Title Risk for Montana Farm/Ranch Operators.” Extension Risk Management Education Conference, Kansas City, MO.

- Muske, Glenn; Goetting, Marsha A; and Vukonich, Merrylee. (October 2000). “Teaching Retirement and Family Resource Management Using the Web.” American Council on Consumer Interests Conference.

- Goetting, Marsha A.; Raiser, Lorrie; Martin, Peter; Poon, Leonard and Johnson, Mary Ann. (November 1994). “Older Women’s Financial Resources.” Gerontological Society of America, Atlanta.

- Goetting, Marsha A. (October 1987). "Economic Contribution of Extension Home Economics Programs." National Association of Extension Home Economists Conference, Louisville, Kentucky.

- Goetting, Marsha A. (November 1987). "How a Financial Calculator Can Help Families in Economic Crisis Make Decisions." Rural Families in the Midwest Conference, Kansas State University, Manhattan, Kansas.

- Goetting, Marsha A.; Muggli, Gayle. (October 1987). "Financial Decision Making With a Financial Calculator." National Association of Extension Home Economists Conference, Louisville, Kentucky.

- Goetting, Marsha A. (December 1983). "Evaluation Process for a Study-at-Home Series on Estate Planning." National Extension Staff Development Workshop on Evaluation and Accountability, Denver, Colorado.

Refereed Poster Presentations

- Goetting, Marsha A. (March 2002). "Financial Security in Later Life Conference." Cooperative Extension System Initiative Rollout Conference, Myrtle Beach, South Carolina.

- Muske, Glenn; Goetting, Marsha A.; Vukonich, Merrylee. (November 1999). "The Internet: A Training Tool for Cooperative Extension." Association for Financial Counseling and Planning Education, Phoenix, Arizona.

- Goetting, Marsha A. (November 1998). "Tracking Systems that Work," Association for Financial Counseling and Planning Education, Ft. Lauderdale, Florida.

- Goetting, Marsha A. (September 1998). "Estate Planning: the Basics," Western Region Home Management Family Economics Educators' Conference, Salt Lake City, Utah.

- Goetting, Marsha A.; Martin, Peter; Johnson, Christine. (November 1996). "Older Adults and Financial Bequests," Gerontological Society of America, Washington, DC.

- Goetting, Marsha A. (November 1991). "How a Financial Calculator Can Help Secondary Students Make Decisions About Their Finances", Western Region Family Economics Educators Conference, Denver, Colorado.

- Goetting, Marsha A. (November 1991). "Using a Register to Track Family Cash, Credit, and Check Expenditures," Western Region Family Economics Educators Conference, Denver, Colorado.

- Goetting, Marsha A. (October 1991). "Credit Control," Association of Financial Counseling and Planning Education, Kansas City, Kansas.

- Goetting, Marsha A. (February 1988). "Check Register Tracking System," National Family Economics Extension Specialist Workshop, Chicago, Illinois.

- Goetting, Marsha A. (February 1988). "How a Financial Calculator Can Help You Make Decisions," National Family Economics Extension Specialist Workshop, Chicago, Illinois.

Invited Presentations (National, Regional, Other States) (since 1990)

- Goetting, Marsha A. (July 2008). "What's the Financial Status of American Women? Perception vs. Reality," National Conference of State Legislatures, New Orleans, LA.

- Goetting, Marsha A. (August 1999). "High School Financial Planning Program Evaluation," National Endowment for Financial Education, Denver, CO.

- Goetting, Marsha A. (April 1998). "Financial Aspects of Mobilization ," Michigan National Guard, East Lansing, Michigan.

- Goetting, Marsha A. (April 1996). "Who Makes Wills and Bequests," Iowa Extension Service Annual Update, Ames, Iowa.

- Goetting, Marsha A. (April 1994). "How A Financial Calculator Can Help You Make Decisions." Iowa Home Economics Association Conference, Iowa City, Iowa.

- Goetting, Marsha A. (June 1992). "Montana's High School Financial Planning Program," College for Financial Planning, Denver, Colorado.

- Goetting, Marsha A. (March 1992). "Financial Decision Making." Wyoming Extension Home Economists, Thermopolis, Wyoming.

- Goetting, Marsha A. (November 1991). Discussant, "Support of Children by Non-Custodial Fathers." Western Region Family Economics Home Management Educator's Conference, Denver, Colorado.

- Goetting, Marsha A. (August 1990). "Financial Calculators for Vocational Teachers." Nevada Vocational Association Annual Meeting, Reno, Nevada.

- Goetting, Marsha A. (August 1990). "Marketing Accountability of Vocational Programs." Nevada Vocational Association, Reno, Nevada.

- Goetting, Marsha A. (May 1990). "Financial Calculators and Decision Making." Women's Day, YWCA, Minneapolis, Minnesota.

- Goetting, Marsha A. (May 1990). "How a Financial Calculator Can Help You Make Decisions." College of St. Thomas, Minneapolis, Minnesota.

EXTENSION POPULAR PUBLICATIONS

MontGuides (Fact Sheets) *since 1989*

- Using a Bypass Trust to Provide for Children from a Prior Marriage (co-author Joel Schumacher), Revised February 2008. (200509)
- Your Important Papers–What to Keep and Where (co-author Katelyn Andersen-Ravalli County Extension Agent), Revised February 2008. (199611)
- Cremation (co-author Corinne Cramer and Claire Del Guerra-Former Extension agents), Revised May 2008. (200201)

- First-Time Home Buyer Savings Accounts (co-author Brian Olsen-Montana Department of Revenue), (199918), Revised June 2008
- Medicaid & Long-Term Care Costs (co-authors Nancy Clark & Marcie Tomas-Montana Department of Revenue), (199511), Revised June 2008
- Revocable Living Trusts, Revised June 2008. (199612)
- Selecting an Organizational Structure for Your Business (co-author Joel Schumacher), Revised June 2008. (199708)
- Talking with Aging Parents About Finances, (co-author Vicki L. Schmall, Ph.D., former Extension Gerontology Specialist and professor, Oregon State University, Corvallis), Revised December 2008 (199324HR)
- What is a Personal Representative?, Revised December 2008, (199008)
- Who Gets Grandma's Yellow Pie Plate?: Transferring Non-Titled Property, (co-author Marlene S. Stum-University of Minnesota), Revised December 2008, (199701)
- Wills, Revised December 2008. (198907)
- Lending Money to Family Members, (199323), Revised February 2007
- Designating Beneficiaries Through Contractual Arrangements, (199901), Revised March 2007
- Nonprobate Transfers, (199509), Revised April 2007
- Transferring Your Farm or Ranch Property to the Next Generation Through a QTIP Trust, co-author Joel Schumacher, (200508), Revised April 2007
- Dying Without a Will In Montana: Who Receives Your Property, (198908), Revised August 2007
- Health Care Savings Account (200704), New August 2007
- Developing a Spending Plan, (199703), Revised September 2007
- Track'n Your Savings Goals (200303), Revised September 2007
- Beneficiary Deeds in Montana (200707), New November 2007
- Using a Homestead Declaration to Protect Your Home from Creditors, (199815), Revised December 2007
- Custodial Accounts for Kids Under Age 21, (199910), Revised March 2006
- Inheriting an IRA: Planning Techniques for Primary Beneficiaries, co-author Kristen G. Juras, Esq. and Adjunct Professor, School of Law, University of Montana-Missoula, (200310), Revised March 2006
- Montana Rights of Terminally Ill Act, (199202), Revised March 2006
- Property Ownership, (198907), Revised April 2006
- Inheriting an IRA: Planning Techniques for Successor Beneficiaries, co-author Kristen G. Juras, Esq. and Adjunct Professor, School of Law, University of Montana-Missoula, (200311), Revised May 2006
- Federal Estate Tax, co-author Joel Schumacher, Extension Assistant, Department of Agricultural Economics & Economics, (199104), Revised July 2006
- Gifting: A Property Transfer Tool for Estate Planning," co-author Joel Schumacher, Extension Assistant, Department of Agricultural Economics & Economics, (199508), Revised July 2006
- Glossary of Estate Planning Terms, (200202), Revised July 2006,
- Selecting a Credit Card, co-author Elizabeth E. Gorham, South Dakota University, (199802), Revised July 2006,
- Replacing Those VIPS: Very Important Papers (with Keri Hayes), Revised January 2005. (199513)
- Estate Planning for Families with Minor Children, Revised January 2005. (199117)
- Accessing a Deceased Person's Financial Accounts (with Jeanne Saarinen), Revised May 2005. (200301)
- Life Insurance: An Estate Planning Tool, Revised June 2005. (199211)
- What is a Personal Representative?, Revised June 2005. (199008)

- Power of Attorney, Revised July 2005. (199001)
- Probate, Revised July 2005. (199006)
- Investing in Certificates of Deposit (with Joel Schumacher), Revised October 2005. (199801)
- Life Estates: A Useful Estate Planning Tool (with Joel Schumacher), New November 2005. (200510)
- Transferring Farm and Ranch Property to the Next Generation through a QTIP Trust (with Joel
- Schumacher), November 2005. (200508)
- Montana Medical Care Savings Accounts (with Jim McKeon), Revised December 2005. (199817)
- Selecting a Credit Card (with Elizabeth Gorham-South Dakota State University), Revised April 2004. (199802)
- What to Do When You Lose Your Job, Revised April 2004. (199702)
- Montana Estate Taxes, Revised January 2003. (200105)
- Should Both a Husband and Wife Work Away From Home, Revised July 2003. (198902)
- Track'n Your Savings Goals (with Corinne Cramer), August 2003. (200303)
- Track'n Your Savings Goals Register (with Corinne Cramer), New August 2003. (EB164)
- Withdrawals from IRAs: When the Owner is Between the Age 59½ and 70½ and When the Owner Turns 70½ (with Kristin Juras), New September 2003. (200309)
- Withdrawals from IRAs: When the Owner is Under Age 59½ (with Kristin Juras), New September 2003. (200308)
- Schedule of Non-Monthly Living Expenses" Revised January 2002. (198910)
- Helping Friends Cope with Financial Crisis (with Sandy Bailey), Revised May 2002. (200206)
- Individual Retirement Accounts, Revised September 2002. (199807)
- Shopping for Individual Retirement Account, September 2002. (200207)
- Estimating the Amount to Save for Retirement (with Joe Atwood), Revised December 2002. (198905)
- Rent to Own Contracts, (with Judith Urich). September 1998. (199812)
- Estate Planning in Montana: Getting Started. August 1995. (199508)
- Talking with Aging Parents About Finances. November 1993. (199324)
- Investing in Savings Accounts. July 1992. (199216)
- Annuities--Estate Planning and Retirement Tool. June 1992. (199213)
- Small Claims Court. March 1992. (199206)
- Financial Aspects of Pre-Marital Agreements. June 1991. (199121)
- Remarried Families Making Financial Decisions. June 1991. (199118)
- Managing Seasonal Income. June 1991. (199110)
- Investing in United States Savings Bonds. January 1990. Series EE-HH (198437)
- Letter of Last Instruction, (with Pourroy). June 1989. (198904)
- Using a Check Register to Track Expenses, (with Ward). Revised August 1989. (198703)

Bulletins (Twelve pages or more) (since 1989)

- Transferring Your Farm or Ranch to the Next Generation. Revised April 1998. EB 149.
- Using a Financial Calculator to Help You Make Decisions. 2000. EB 156.
- Making Financial Decisions at Marriage Dissolution–A Montana Guide. 1999. EB 155.
- Check Register Tracking System, (with Ward). August 1989. EB 50.

Other (Sections in notebooks and newsletters distributed statewide)

- A Helping Hand for Caregivers of Elderly (with Schumacher), Tenderhearts Notebook, Summer 2007.
- Transferring Your Farm/Ranch to Next Generation, (with Taylor). Beef Question and Answers newsletter. December 1999.

Fact Sheets:

- Estate Planning Tools for Owners of Companion or Service Animals and Pets, Goetting, M. McNamee, J., Beyer, G., February 2008
- What is AIPRA and how does it affect you?, Goetting, M., Ruppel, K., March 2007
- Fractionation: Inherited undivided interest, Goetting, M., Ruppel, K., March 2007
- How reservation land is owned?, Goetting, M., Ruppel, K., March 2007
- Your Individual Trust Interest (ITI) Report: How to read it?, Goetting, M., Ruppel, K., March 2007
- Who is eligible to inherit your trust land and retain trust status?, Goetting, M., Ruppel, K., March 2007
- Your undivided interests of 5% or more: What happens if you pass away without a written will?, Goetting, M., Ruppel, K., March 2007
- Your undivided interest of less than 5%: What happens if you pass away without writing a will?, Goetting, M., Ruppel, K., March 2007
- What is a life estate?, Goetting, M., Ruppel, K., March 2007
- Writing a will, Goetting, M., Ruppel, K., March 2007
- Purchase options at probate, Goetting, M., Ruppel, K., March 2007
- Partitioning an allotment, Goetting, M., Ruppel, K., March 2007
- Ways to avoid further fractionation of reservation land, Goetting, M., Ruppel, K., March 2007
- Your Individual Indian Money (IIM) account: What happens to your money if you pass away without a written will?, Goetting, M., Ruppel, K., March 2007
- Definitions, Goetting, M., Ruppel, K., March 2007

Teaching Units

- Get a Grip on Your Money Financial Packet, co-sponsors First Interstate BancSystem Foundation & Montana Credit Unions for Community Development, distributed to over 450 Montanans, December 2008
- Small Steps to Health & Wealth, Hayes, K., Goetting, M., Web site (www.montana.edu/sshw) 2008
- Planning and Saving for Retirement, Hayes, K., Goetting, M., Web site (www.montana.edu/extensionecon/retirement.html) 2008
- Credit $marts Helping You Become Credit $avvy, Hayes, K., Goetting, M., Web site (www.montana.edu/extensionecon/creditsmarts.html), May 2007
- MSU Indian Land Symposium Web site, Hayes, K., Goetting, M., Web site (www.montana.edu/indianland/symposium), July 2007
- American Indian Land Probate Reform Act (AIPRA) Fact Sheets, Web site (www.montana.edu/indianland/factsheets.html), September 2007
- Dying Without a Will in Montana, Web site (www.montana.edu/dyingwithoutawill), September 2007
- Estate Planning for the Next Generation Web site (www.nextgeneration.montana.edu), September 2007

- Get Smart About Credit, Revised 2006.
- Teach Children to Save, 2004.
- Credit Cards: Avoid the Minimum Payments Trap, 2004.
- Quicken for Family Finance, 2001.
- Montana Medical Care Savings Accounts, 2001
- Medicaid and Long Term Care Costs, 2001

Study-at-Home Courses (since 1989)

- Quicken 2001 & 2002 Family and Personal Resources, 2001, 9 sessions.
- Planning for the Passing of Ft. Belnap Lands to Future Generations, October 2001, 7 lessons.
- Planning for Passing of Crow Lands to Future Generations, 2001, 6 lessons.
- Estate Planning: The Basics. Revised 2001. 15 part series.
- Getting It Together , (with Pourroy). 1989, revised 1995. 16-part interactive series.

Interactive CD

- Ruppel, K., Goetting, M., Hayes, K., *Inheriting Indian Land Indian Land Tenure in the Wake of the American Indian Probate Reform Act,* April 2007
- Hayes, K., Goetting, M., *Dying Without a Will in Montana* CD, September 2007

Popular Press Publications (Selected) Authored and Co-Authored with Carol Flaherty, MSU Communication Services (since 2007):

<u>2008</u>

- Goetting, M., CSRESS Family Farm Forum, “Passing Indian Lands Fact Sheets,” April 2008
- Provided interview with Suzanne Waring for “Surviving a Recession” 50 Plus, Great Falls Tribune, January 2008
- Provided interview with Diane Edwards who published article in Signature Montana, Spring 2008
- Goetting, M., Small Farm Digest, “American Indian Probate Reform”, Spring 2008
- Goetting, M., Montana Lawyer, Volume 33 (4), “Beneficiary Deeds,” January 2008
- Goetting, M., Keller Williams Realty-Bozeman, “Homestead Declaration,” Fall 2008
- Goetting, M., MEAFCS News, “Beneficiary Deeds,” February 2008
- Goetting, M., Prime Senior Newsletter, “Beneficiary Deeds,” March 2008
- Provided interview and additional content for “Wills” Feature in Billings Gazette, March 2008
- Goetting, M., MSU Ag Link College of Agriculture newsletter, “Who Inherits?” Spring 2008
- Goetting, M., Montana Financial Education Coalition newsletter, “Get a Grip on Your Money” and “Beneficiary Deeds,” July 2008
- Goetting, M., MSU News Release, “98 percent of Montanans miss a way to cut their taxes,” December 2008*
- Goetting, M.., MSU News Release, “Free information packet just right for Christmas or New Year’s,” December 2008*
- Goetting, M., MSU News Release, “Are you 62 or Older Check for Montana Tax Credit,” January 2008*
- Goetting, M., MSU News Release, “Montana Farm and Ranch Couple can receive estate planning incentive” February 2008*

* MSU no longer has a database that shows what Montana newspapers printed articles.

2007 – *(10 articles published in approximately 60 newspapers)*

- Goetting, M., (February 2007), "Montana End-of-Life Registry." The Montana Lawyer.
- Goetting, M., (Summer 2007), "MontGuides Help You Plan Ahead." AARP Montana.
- Goetting, M., (Summer 2007), "Get Credit $marts, Become Credit $avvy." MFEC Notes.
- Goetting, M., (Summer 2007), "New MontGuide for Montana's End-of-Life Registry," MFEC Notes.
- Check for Elderly Homeowner Tax Credit, January 20007, Published in 25 newspapers.
- Young Montana Farm and Ranch Couples Can Receive Estate Planning Incentive, 8 newspapers, February 2007.
- Financial Education Meeting for Families and Professionals Set for April 10 – 11, March 2007, Published in 8 newspapers
- Use a Homestead Declaration to Protect Home Equity, July 2007, Published in 1 newspaper
- Native Americans Have New Probate Options and Information, July 2007, No records.
- Credit $marts program for Teachers, Parents is available free on Web, August 2007, Published in 2 newspapers,
- Free Publications Suggests a Way to Control Health Care Expenses, October 2007, Published in 6 newspapers
- MSU Extension has Publication Explaining New Estate Planning Tool, December 2007, Published in 3 newspapers
- Open a Medical Care Savings Account before Dec. 31 for 2007 Tax Savings, December 2007, Published in 5 newspapers
- Who Inherits? The Answer is a Click Away?, December 2007, Published in approximately 2 newspapers

INSTRUCTIONAL ACTIVITIES

Extension Classes (Since 2000)

Year	Number of Classes	Number of Participants	Subjects
2008	67	2,036	American Indian Probate Reform Act (AIPRA), Beneficiary Deeds, Credit Savvy, Dying Without a Will, Estate Planning, Financial Status of American Women, Financial Resources, Get a Grip on Your Money, Land Transfers, Legal & Financial Issues of Alzheimers, PODs & TODs, Property Ownership, Representative Payees & Joint Tenancies, Saving & Investing for Your Future, Small Steps to Health & Wealth, Tracking Your Money, Transferring Land to Next Generation, Will Writing, Who Receives Your Property When you Die?
2007	40	1,258	American Indian Probate Reform Act (AIPRA), Beneficiary Deeds in Montana, Conservatorships, Credit Savvy, Estate Planning, Financial & Legal Aspects of Alzheimer's, Financial Planning, Financial Issues for Grandparents Raising Grandchildren, Montana Medical Care Savings Accounts, PODs & TODs, Property Titles & Montana Law, Stepped-up Basis vs. Carryover Basis

Year	Number of Classes	Number of Participants	Subjects
2006	65	1,202	Estate Planning, Property Ownership, Estate Planning for Families with Minor Children, Legal and Financial Aspects of Alzheimer's, Who Get's Your Property When You Die, Federal and State Estate Planning Laws, American Indian Probate Reform Act, How is your Property Titled, Montana's End-of-Life Registry, Financial Laws Affecting Montanans, Estate Planning for the Next Generation, Montana Grandparents Raising Grandchildren
2005	47	1,542	Estate Planning, Property Ownership, Financial Planning, Estate Planning: Tax Law Changes, Indian Probate Law, Transferring Your Farm and Ranch to the Next Generation, Credit Management, Federal Estate Taxes, Legal & Financial Concerns for Alzheimer Caregivers, Retirement Planning, Power of Attorney, Trusts, Planning for the Passing of Reservation Land Under American Indian Probate Act of 2004, High School Financial Planning
2004	60	1,846	Estate Planning, Retirement Planning, Financial Calculators, Teaching Children to Save, Credit Management & Identity Theft, Savings & Investments, Track'n Your Savings Goals, Credit Cards: Avoid the Minimum Payments Trap, Financial Management, Financial Planning & Decision Making, Property Rights, Montana Medical Care Savings Accounts
2003	63	2,121	Estate Planning, Cremation, Retirement Planning, Transferring Farm or Ranch to Next Generation, Financial Management, Using Financial Calculators to Make Decisions About Finances, The Need for Financial Education, Credit Management, Credit Cards, First-Time Homebuyers,, Montana Community Partner Roundtable, Financial Champions, Saving Techniques, Financial Management for Children
2002	51	1,936	Estate Planning, Using a Financial Calculator, Cremation, Finances, Budgeting, Financial Alternatives for Aging Parents, Montana Medical Care Savings Accounts, Investments, Surviving the Drought, Utilizing Extension Resources, High School Financial Planning, Financial Exploitation of the Elderly, Retirement Planning, Spending Plans for Potential Homebuyers
2001	55	1,650	Medical Care Savings Accounts, Medicaid Long Term Care Costs, Budgets, Estates, Finances, Retirement, Quicken 2001 for Personal Finance, Estate Planning

Year	Number of Classes	Number of Participants	Subjects
2000	49	1,206	Estate planning, finances, budgeting, investments, financial decision-making, using the Web and calculators to make financial decisions, retirement planning, High School Financial Planning, checking accounts, tax-deferred and tax free accounts

In-service Education Classes Since 2000: (for MSU County Extension Faculty); Iowa Extension; Wyoming Extension *In-Service was provided via the Adobe Acrobate System)

- Family Economics Programming, March 2008, 12 participants (0.5 hours)
- What’s New in Financial Education, July 2008, 31 participants (1.5 hours)
- Retirement Planning, October 2008, 125 participants (1 hour)
- * American Indian Probate Reform Act (AIPRA), January 2007. 17 participants. (1 hour)
- * Montana End-of-Life Registry, February 2007. 19 participants. (1 hour)
- * Beneficiary Deeds, September 2007. 7 participants. (1 hour)
- * Beneficiary Deeds, September 2007. 9 participants. (1 hour)
- * Beneficiary Deeds, September 2007. 1 participant. (1 hour)
- * High School Financial Planning Program, September 2007. 20 participants. (1 hour)
- * High School Financial Planning Program, September 2007. 10 participants. (1 hour)
- * Small Steps to Health & Wealth, December 2007. 24 participants. (1 hour)
- * Small Steps to Health & Wealth, December 2007. 8 participants. (1 hour)
- Financial Management, New Laws & Programs, 2006. (3 hours)
- Estate Planning for Retired Faculty. 2005. (1 hour)
- Property Titles & Youth. 2005. (1 hour)
- Family Economics Program Samples. 2005. (15 minutes)
- In-Service Education for MSU Extension Agents. 2005. (45 minutes)
- Credit Cards: Avoid the Minimum Payments Trap. 2004 (2 hrs).
- Track’n Your Savings Goals. 2004 (2 hrs).
- 4-H Financial Champions. 2003 (5 hrs).
- Track’n Your Savings. 2003 (4 hrs).
- Teaching Financial Education: How Can You Get Involved. 2003 (1hr).
- Montana Rights of Terminally Ill Act. 2003 (1.5 hrs).
- Using a Financial Calculator to Teach Financial Concepts in the Classroom. 2003. (2 hrs).
- Financial Security in Later Life. 2002 (4 hours).
- Quicken Personal Finance Training. Sidney & Lewistown. 2001 (24 hours).
- Medicaid & Long Term Care Cost. 2001. (4 hours).
- Montana Medical Care Savings Accounts. 2001. (2 hours)
- Aging Family Economics Issues & Retirement Planning. 2000. (2.5 hours).
- Family Finances. 2000. (2 hours).
- Family Economics Update. 2000. (4 hours).

GRANTS (Since 1997)

Cash awards and equipment

- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, $2,000, 2008
- High School Financial Planning Program, National Endowment for Financial Education, $2,000, 2007
- Financial Risks of Dying Without a Will, Western Center for Risk Management Education, Collaborators: Montana Department of Agriculture, State Bar of Montana, and Montana Grain Growers Association, 2006-2009. $40,000
- Risk Management Education: Avoiding Further Fractionation on Montana Reservation Lands under the American Indian Probate Reform Act (AIPRA) Symposium; Goetting, Ruppel, $32,076; 2006-2008
- Risk Management Estate Planning: Planning for the Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act of 2004, Risk Management Agency Community Outreach and Assistance Partnership, 2005-2008. $130,000
- National Endowment for Financial Education, High School Financial Planning Program, 1990-present $16,000.
- Get Smart About Credit, MSU Extension mini-grant, Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2006. $18,000 ($6,000 each)
- Estate Planning for the Next Generation, Western Center for Risk Management Education, 2005. $39,989
- Managing Property Title Risks for Montana Farm/Ranch Operators, Western Center for Risk Management Education, 2004. $34,170.
- Risk Management Estate Planning for Montana Fort-Peck Tribal Members: Planning for the Passing of Agricultural Reservation Land to Avoid Further Fractionation, USDA Risk Management Agency-Community Outreach and Assistance Partnership Program, $75,000.
- Teach Children to Save, First Interstate BancSystem Foundation, Montana Credit Unions for Community Development, MSU Extension 2004. $3,245.
- Credit Cards: Avoid the Minimum Payments Trap, First Interstate BancSystem Foundation, Montana Credit Unions for Community Development, 2004 $3,000.
- First Interstate Bank Foundation, 2003. $1,500.
- Montana Credit Unions for Community Development, 2003. $1,500.

PROFESSIONAL MEMBERSHIPS AND OFFICES

National

- National Coalition for Consumer Education, 1992-2003.
- Association for Financial Counseling and Planning Education, 1991-present.
- American Association of Consumer & Family Sciences, 1974-present.
- American Council on Consumer Interests (ACCI), 1974-present.
- Phi Epsilon Omicron (Honorary Association), 1973-present.
- Omicron Nu (Honorary Association), 1972-present.

State

- Montana Financial Education Coalition, Board of Directors, 2004-2006, Conference Planning Chair, 2006
- Epsilon Sigma Phi (Honorary Association), 1985-present. President, 1992; Vice President, 1990-91. Scholarship Chairman, 1986-1991. Membership Chairperson, 1991.
- Montana Association of Extension Family and Consumer Sciences, 1978-present. Public Relations Chairman, 1987-1989. Scholarship Committee Chairman, 1984.
- Montana Cooperative Extension Association (MCEA), 1978-present. Health Insurance Committee Member, 1980.
- Montana Extension Association of Family and Consumer Sciences, 1978-present. Treasurer 2005-2008. State Meeting Evaluation Form Designer, 1990. Board Member, 1984; 1987.

SERVICE (Since 2000)

National

- International Farm Transition Network Advisory Committee Member, John Baker, Project Director, Iowa State University, 2008 – 2009.
- Farm Transition Planning Web site Advisory Committee Member, Dale Norquist, Project Director, University of Minnesota, 2008 – 2009.
- Facilitator, Managing Consumer Credit Round Table: Pre-conference, Association for Financial Counseling Planning Education, Tampa, FL, November 2007.
- Planning Committee Member, Extension Risk Management Education Estate Planning: Pre-conference, Phoenix, AZ, April 2007.
- External Reviewer for National Extension Association of Family & Consumer Sciences, Promotion & Tenure Candidates, 2004-present.
- Investment Committee Member, National Extension Association for Family and Consumer Sciences, 2004-present.
- Estate Planning Committee Member, RMA-Pre Conference, November 2006.
- Talking With Aging Parents About Finances MontGuide was accepted as Featured Resource on Financial Security for All-Community Practice Web site, 2006.
- State Representative for High School Financial Planning Program, 1990-present.
- Association for Financial Counseling and Planning Educators, Reviewer, 6 poster presentations, 2004-2005.
- Interviewed by Washington Post, Schools Investing in Fiscal Literacy, Printed February 17, 2004.
- Personal Committee, Association for Financial Counseling and Planning, 2003.
- Selection Committee, Association for Financial Counseling and Planning Educators Distinguished Fellow, 2003.
- Facilitator, National Endowment for Financial Education, High School Financial Planning Breakout session on NEFE website, 2003.
- External Reviewer, National Extension Association of Family & Consumer Sciences, 2003.

State (since 2000)

2008

- Montana Financial Education Coalition Board Member.
- Attorney General, End-of-Life Registry Advisory Council.
- Department of Public Health & Human Services, State Health Insurance Program (SHIP) Advisory Council.
- MontanaLawHelp State Advisory Committee.

2007

- Chairperson, Montana Financial Education Coalition Conference, Billings-MT, 165 attendees, April 2007.
- Montana Financial Education Board Member.
- Attorney General, End-of-Life Registry Advisory Council.
- Department of Public Health & Human Services, State Health Insurance Program (SHIP) Advisory Council.
- MontanaLawHelp State Advisory Committee.

2006

- Member, End of Life Advisory Council, Montana Attorney General's Office, 2006.
- Legal Member Developer Advisory Council, Department of Public Health and Human Services, 2006.
- Chairperson, Montana Financial Education Coalition, Statewide Conference Planning, 2006.
- Member, Board of Directors, Montana Financial Education Coalition, 2006.
- Member State Health Insurance Advisory Council, 2006.
- Member, Montana Legal Service Web Site Stakeholder Committee, State Bar of Montana, 2006.
- Reviewer, "Advance Directives Made Easy," "Aging Services, Montana Department of Public Health and Human Services, 2006.
- MSU Extension End-of-Life links are provided at the Department of Justice Attorney General Web site.

2005

- Member, State Health Insurance Advisory Council, 2005.
- Member, Montana Legal Service Website Stakeholder Committee, State Bar of Montana, 2005.
- Member, Board of Directors, Montana Financial Education Coalition, 2005.

2004

- Provided Montana Medical Care Savings Accounts MontGuide for Montana Governors Conference on Aging, January 2004.
- Member, Montana Legal Service Website Stakeholder Committee, State Bar of Montana, 2004.
- Provided educational Estate Planning materials for United Way, Great Falls, MT, March 2004.
- Member, Board of Directors, Montana Financial Education Coalition, 2004.
- Provided copies of First-Time Homebuyers Savings Accounts MontGuide to Montana Department of Revenue for distribution from that office, November & December 2004.

2003

- Testified, Senate and House Education Committees regarding the Need for Financial Education, Feb 3-March 14, 2003.
- State MSU Representative, State Health Insurance Program (SHIP) Advisory Board, 2003.
- State MSU Representative, Consumer Advisory Council (DPHHS), 2003.
- State MSU Representative, Montana Financial Education Focus Croup, Developed coalition to coordinate financial education in Montana, 2003.

- State MSU Representative, Montana Geriatric Education Advisory Board, University of Montana, 2003.
- State MSU Representative, Department of Public Health and Human Services Legal Advisory Committee, 2003.

2002

- Reviewer, Perspective After Tragedy: Financial Lessons Learned During 2001" The Forum for Family Economics Issues, 2002.
- Reviewer, Financial Calculating for Counselors, Financial Counseling in Practice, author Ron Wall, University of Hawaii, 2002.
- Reviewer, Examining Predictions of Self-Perceived Life Expectancy" Association for Financial Counseling and Planning Education student paper submission, 2002.

2001

- Reviewer, Do You Want to Work Forever? Child Care Finance Session Plans, Maryland Cooperative Extension, 2001.
- Reviewer, Executors & Trustees of Family Estates, Interdisciplinary Journal of Applied Family Studies, 2001.
- Reviewer, Factors Related to Women's Confidence Regarding their Preparedness for Retirement, Association for Financial Counseling & Planning, 2001.
- Reviewer, Determinants of Life Insurance Holding Decision: An Application of Human Capital, Request Motives and Risk, Association for Financial Counseling and Planning, 2001.
- Reviewer, College Student Credit Card–Usage and the Need for on Campus Financial Counseling and Planning Services, Association for Financial Counseling and Planning, 2001.
- Reviewer, Tracking Your Expenses and Making Ends Meet, University of Idaho, 2001.

2000

- Reviewer, Organizing Your Financial Records. University of Wisconsin Extension, 2000.
- Reviewer, Taking Control of Your Spending. University of Wisconsin Extension, 2000.
- Reviewer, Perceptions of Adolescent Children on the Effects of Financial and Interpersonal Functioning on Family Quality of Life. Journal of Family and Economic Issues, 2000.
- Reviewer, Who Gets Grandma's Pie Plate: Transferring Non-Titled Property. The Forum for Family Economics Issues,2000.
- Reviewer, Your Divorce: Some Financial and Recording Keeping Tasks. Oregon Cooperative Extension Service, 2000.
- Reviewer, The Financial Checkup. Utah State University, 2000.
- Reviewer, Long Term Care Web Based Course. Nebraska Extension Service, 2000.

Montana State University

- Master Committee Memberships, 2008:
  - Kaylene Drummer, Education
- Member, Academic Technology Advisory Council, 2007
  - Eric Reinertson, Health & Human Development
- Internship Students, 2006:
  - Mary Anne Anderson, Education
  - Hanna Meccage, Health & Human Development
- Member of Masters Graduate Committees for:
  - Kimberly Rehn, Health & Human Development Department
  - Bernadine Warwood, Health & Human Development Department
  - Margie Haines, Health & Human Development Department
- Graduate Representative Committee Member for two doctoral students (Kadence Drummer and Richard Jones), 2005.
- Member, Health and Human Development, Family & Consumer Sciences Advisory Committee, 2004.
- Reviewer promotional brochure for Health & Human Development Department, April 2004.
- MSU Extension Service, Program Planning Committee, October 2004.
- Reviewer Tenure Dossiers, Health and Human Development, 2003-2004.

MSU College of Agriculture

- Supervise undergraduates for American Indian Probate Reform Act:
  - Tony Little Owl
  - Tamara Birdsbill
  - Floyd Azure II
- Member, Promotion and Tenure Committee for Wendy Stock, 2006
- Supervised graduate students, 2006:
  - Mary Anne Anderson

MSU Departments

- Search Committee Member Vice Marsh Position, Ag Econ & Econ Department, 2008.
- Member, Ag Econ & Econ Promotion and Tenure Committee for Chris Stoddard, 2007.
- Member, Ag Econ & Econ Search Committee, Vice (John Marsh position)
- Member, Promotion and Tenure Committee, 2005.
- Supervisor, Graduate Students (Joel Schumacher and Tyler Wiltgen), 2005.
- Advisory Committee, 2002-2003.
- Short presentation on Extension Family Economics Programs at MCEE/MSU workshops for Secondary teachers, February 2003.

MSU Extension

Search Committees

- Agricultural Marketing Search Committee Member, 2000.

Promotion and Tenure Committees

- Promotion and Tenure Committee Member, 2000.

Other

- Letter of Last Instruction (MSU Extension MontGuide) included as a part of Getting Started With Your Financial Binder, Utah State University Extension, September 2008.
- Your Important Papers: What to Keep & Where (MSU Extension MontGuide), Household Records, excerpts included in records article in Financial Insights, Spring 2008, D.A. Davidson & Company.
- First Security Bank of Bozeman lists 21 MSU Extension Financial Management MontGuides at their Financial Tools and Resources section, 2008.
- Provided MSU Extension MontGuide, Beneficiary Deeds in Montana and background information, to Shannon Ferell, Dept of Agricultural Economics-AG Law, Oklahoma State University who is developing a similar publication on Oklahoma's Nontestmentary Transfer of Property Act.
- Provided MSU Extension MontGuide, Beneficiary Deeds in Montana, for use in Adult Education Class in Bozeman taught by attorney, Brian Close, May 2008.
- Granted permission to Oklahoma State University to adapt MSU Extension Credit Card Tracker, May 2008.
- Coordinated MEAFCS Referred Presentations for Sharing Session during FCS Update Bozeman, May 2008.
- Provided example MontGuide and list of materials for the Bozeman Wal-mart Training program, 2008
- Interviewed by Terri Cettins for "Raise Money-Smart Kids for Parenting Magazine, Published April 2007.
- Granted permission to Equal Justice Works AmeriCorps Attorney Jonathon Morgan to print Power of Attorney and Montana Rights of Terminally Ill MontGuides for his clientele across the state, 2007
- Granted permission to First Security Bank-Bozeman, to hot link MSU Extension Financial Management Publications at their Web site, 2007.
- Granted permission to Indian Land Tenure Foundation to link to AIPRA Fact Sheets, Howard Valendra, 2007.
- Granted permission to University of Nevada to use diagrams in AIPRA Fact Sheets for materials they were developing, Loretta Singletary, 2007.

Collaboration Organizations

(Cooperated with in the development and review Extension materials)

- Community & Outreach Partnership Program, Risk Management Agency (AIPRA Fact Sheets), 2008
- Montana Attorney General's office (End-of-Life Registry), 2008
- State Bar of Montana (Dying Without a Will in Montana Web site & CD), 2008
- Washington State University Western Center for Risk Management Education (Dying Without a Will), 2008
- Montana Credit Unions for Community Development (Get Smart About Money Financial Packets), 2008

- First Interstate BancSystem Foundation (Get Smart About Money Financial Packets)
- Bureau of Indian Affairs Administrative Law Judges, 2007-present
- Community & Outreach Partnership Program, 2007-present
- Indian Land Tenure Foundation, 2007-present
- Indian Land Working Group, 2007-present
- Montana Attorney General's Office, 2007-present
- Senior & Long-term Care Division-DPHHS, 2007-present
- Washington State University Western Center for Risk Management Education, 2007-present
- Montana Securities Division, 1998 to present.
- Montana Department of Revenue, 1998 to present.
- Montana Legal Services, 1993 to present.
- State Bar of Montana--Business, Estates, Trust Tax, and Real Property Law Section, Family Law Section, Women's Law Section, Elderly Assistance Committee. 1980-to present.
- Montana Credit Union Network. 1997 to present.
- First Interstate BancSystem Foundation. 2000 to present.

PROFESSIONAL DEVELOPMENT (Since 2000)

Certification

- Family and Consumer Science Home Economist, FCS, Association of Family and Consumer Science; 75 hour continuing education requirement every three years, 1993 to present.
- Certified Financial Planner, CFP, College for Financial Planning, Denver, Colorado, 30-hour annual continuing education requirement, 1985-present.

Conferences

National

- Women in Agriculture Educators Conference, Oklahoma City, OK, April 2008.
- National Conference of State Legislatures, New Orleans, LA, July 2008.
- American Indian Probate Reform Act & Will Writing, Institute for Indian Estate Planning and Probate, Albuquerque, NM, September 2008.
- Association for Financial Counseling and Planning Educators, Earned 13 CFP Continuing Education Units, November 2008.
- Estate Planning for Charities, Dome Mountain, May 2006.
- Titling Your Real Property & Personal Property, University of Arizona and MSU, Bozeman, June 2006.
- Estate Planning Beyond Basics, University of Arizona and MSU, Bozeman, June 2006.
- Legal & Financial Aspects of Alzheimer's, Denver, CO, October 2006.
- Indian Lands Working Group, Cabazon, CA, October 2006.
- Indian Probate Law Indian Enterprises, San Diego, CA, June 2005.
- Association for Financial Counseling and Planning, Phoenix, AZ Nov. 2005.
- Indian Land Consolidation Symposium, Walker, MN, Sept. 2004.

- Association for Financial Counseling and Planning, Denver, Co, Nov. 2004.
- Association for Financial Counseling and Planning, Savannah, GA, Nov. 2003.
- Financial Security in Later Life Conference, Myrtle Beach, SC, March 2002.
- Association for Financial Counseling and Planning, Phoenix, AZ, Nov. 2002.
- Association of Financial Planning and Counseling, Orlando, FL, Nov. 2001.
- Association of Financial Planning and Counseling, St. Louis, 2000.

State

- Montana Financial Education Coalition, Focusing on Financial Literacy, January 2008.
- The Complete Trust Course, Billings, MT, Earned 7 CFP Continuing Education Units, January 2008.
- Montana Gerontology Society Annual Conference, Bozeman, April 2008.
- Governor's Conference on Aging, Helena, May 2008.
- Great Northern Ag Conference, Plentywood, October 2008.
- Governor's Conference on Aging, Helena, May 2007.
- Montana Financial Education Coalition Conference: Saving Our Future Depends on It, Billings, April 2007.
- Estate Planning for the Next Generation, Montana Department of Agriculture, Helena, January 2006.
- National Conference of State Legislatures, Helena, January 2006.
- Estate Planning for the Next Generation Video Conference, 13 Montana Towns, March 2006.
- Financial Laws Affecting Montanans, Montana Association of Family & Consumer Sciences, Bozeman, April 2006.
- Who Gets Grandma's Yellow Pie Plate, Governor's Conference on Aging, Helena, May 2006.
- Montana Grandparents Raising Grandchildren, Great Falls, June 2006.
- Montana Grandparents Raising Grandchildren, Billings, June 2006.
- Annual Tax Institute School of Law, University of Montana, October 2005.
- Medicare Part D and Big Sky Rx Training, AARP, Bozeman, MT, November 2005.
- Money Smart Training, Federal Deposit Insurance Corporation, Helena, MT, November 2005.
- Financial Education Building Montana Communities, Montana Financial Education Coalition Conference, November 2005.
- Senior City Fraud, Auditor's Office, Bozeman, January 2004.
- Montana Association of Family and Consumer Sciences "Shaping Lives of Families and Professionals", Big Sky, April 2004.
- Montana Financial Education Coalition Annual Conference, Helena, November 2004.
- Senior Fraud Summit, Helena, May 2003.
- Getting Adult Learners Motivated Enthusiastic and Satisfied, Bozeman, April 2003.
- The Estate Planning Course, Billings, June 2003.
- Montana Association of Family and Consumer Sciences Conference, Missoula, April 2003.
- Montana Association of Family and Consumer Sciences Conference, Lewistown, April 2002.
- Alzheimer's Conference, Bozeman, May 2002.
- Senior Fraud Summit, Helena, May 2002.
- Tax Institute, University of Montana, School of Law, 2001.
- The Complete Trust Workshop, Professional Education Systems, Billings, 2000.
- Montana Association of Family and Consumer Sciences, Fairmont, 2000.
- Federal Estate and Gift Tax Workshop, Professional Education Systems, Missoula, 2000.

- Medicaid Planning and Substitute Decision Making in Medical Educational Services, Missoula, 2000.
- Tax Practitioner Institute, Center for Business Enterprise, Billings, 2000.

Other

- Principal Investigator Training, MSU Grants & Contracts office, November 2004.
- Opportunities for Estate Planning for CPA, 2001.
- Web CT, MSU Campus, 2000.