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EDUCATION

- Ph.D. - Family Resource Management, Iowa State University, May 1996
Dissertation: Older Adults, Bequests and Wills
M.S. - Adult Education, Kansas State University, December 1973
M.S. - Home Economics, Kansas State University, May 1973
B.S. - Home Economics Degree, Kansas State University, December 1971

PRESENT POSITION

Professor and Extension Family Economics Specialist: Extension, Department of Agricultural Economics and Economics, Montana State University, Bozeman, MT (1977 to present).

Responsibilities: Provide 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 of publications that are available from MSU and county offices.

PUBLICATIONS AND EDUCATIONAL MATERIALS-Summary

- 56 Referred Journal Articles and Book Chapters. Focus: Estate Planning and Financial Management
- 18 Reviewed Conference Proceedings
- 56 Extension publications on financial management and estate planning
- *Estate Planning: The Basics packet*, distributed to over 1,600 Montanans
- *Dying Without a Will in Montana Interactive CD & Web site*, coordination with State Bar of Montana, CD distributed to over 1,344 Montanans

PROFESSIONAL REFEREED JOURNALS/CONFERENCE PROCEEDINGS

- Estate Planning Interactive Site. National Extension Risk Management Education Conference, Reno, NV. March 2009
- American Indian Probate Reform Act & Will Writing, Institute for Indian Estate Planning and Probate, Albuquerque, NM, September 2008
- American Indian Probate Reform Act and Extension Risk Management Conference. Extension Risk Management Education Conference, Phoenix, AZ, April 2007
- Managing Property Title Risk for Montana Farm/Ranch Operators. Extension Risk Management Education Conference, Kansas City, MO, April 2005
- Track'n Your Savings Goals. Association for Financial Counseling and Planning Educators Conference Proceedings. Savannah, GA, November 2003
- Creating Financial Champions–Potpourri of Resources for Teaching Kids About Money. Association for Financial Counseling and Planning Educators Conference Proceedings. Savannah, GA, November 2003

HONORS AND AWARDS

National

- National Association of 4-H Agents, Service Award, 2009
- Epsilon Sigma Phi National Extension Honorary, Distinguished Service Award, 2009
- National Extension Association of Family & Consumer Sciences (NEAFCS), Continued Excellence Award, 2008
- National Extension Association of Family & Consumer Sciences (NEAFCS), First Place, Western Region, Mary Wells Diversity Award (Passing Reservation Lands), 2008
- National Extension Association of Family & Consumer Sciences (NEAFCS), First Place, Western Region, Communication-Internet Technology Award (Dying Without a Will in Montana), 2008
- USDA, Priester Award, 2007
- Planning for Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act (AIPRA) of 2004, Regional Qualifying Program, Western Extension Director's Awards of Excellence,
- National Extension Association of Family & Consumer Science, Education Technology Award, 2000
- Graduate College, Iowa State University, Research Excellence Award, 1996

Regional

- First Place, Western Region, Mary Wells Diversity Award (Passing Reservation Lands), National Extension Association of Family & Consumer Sciences, 2008
- First Place, Western Region, Communication-Internet-Technology Award (Dying Without a Will in Montana), National Extension Association of Family & Consumer Sciences, 2008
- Dean Don Felker Financial Management Award along with six Extension Agents, Western Region National Extension Association of Family & Consumer Sciences, 2008.
- Florence Hall Award, National Extension Association of Family & Consumer Science, 2006
- Get Smart About Credit, Western Region Financial Management Award, 2006
- Starter Savings Kits for Kids, Western Region Financial Management Award, National Extension Association of Family and Consumer Sciences, 2005

Montana

- President's Excellence in Outreach Award, Montana State University, 2006
- State Team Award, Epsilon Sigma Phi, Legal & Financial Concerns for Alzheimer's Caregivers, 2006
- Montana Family & Consumer Sciences Excellence in Extension, 2005
- Montana Family & Consumer Sciences Distinguished Service Award, 2003
- Outstanding 4-H Alumnae, Montana 4-H Foundation, 2001

INSTRUCTIONAL ACTIVITIES

Over 800 presentations on estate planning, finances, investments, financial decision-making: 25,000 participants

GRANTS AWARDED/RESEARCH

- Risk Management Education: Avoiding Further Fractionation on Montana Reservation Lands under the American Indian probate Reform Act (AIPRA) Symposium, Risk Management Agency, \$32,076, 2006 - 2008.
- Financial Risks of Dying Without a Will, Western Center for Risk Management, \$40,000, 2006 - 2009.
- Risk Management Estate Planning Education: Planning for the Passing of Agricultural Reservation Land to Avoid Further Fractionation Under the American Indian Probate Reform Act of 2004, Risk Management Agency, \$130,000, 2005 - 2008.
- Indian Land Symposium, Risk Management Agency, \$35,284, 2006.
- Managing Transfer Risks for Next Generation of Montana Farm/Ranch Operators, Western Center for Risk Management, \$39,989, 2005.