

Curriculum Vita

MARSHA A. GOETTING

2023

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EDUCATIONAL BACKGROUND

- **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*
- **Certified Financial Planner**, College for Financial Planning, March 1999-present
- **American Association of Family and Consumer Sciences Certification**, June 1995 - present

EMPLOYMENT HISTORY

- **Professor, MSU Extension Family Economics Specialist:** (July 1992 to present); Montana State University Extension-Bozeman, Department of Agricultural Economics and Economics, Bozeman, MT. Responsibilities: Provide family financial education and estate planning education for 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. Develop publications to be 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, and conduct computer analysis of data and co-author articles.
- **Associate Professor, MSU Extension Family Economics Specialist:** Montana State University Extension-Bozeman, Department of Agricultural Economics and Economics (July 1987-June 1992). *Major Accomplishments:* Getting Your Household in Order Newspaper Series” 1990, 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; Using a Financial Calculator to Make Financial Decisions.
- **Assistant Professor, State Consumer Education Specialist:** Cooperative Extension Service, Montana State University, Bozeman, MT, (April 1977-June 1987). *Major Accomplishments:* "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: Collaborated 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 consumer education 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 students, graded assignments, and presented lectures. Assisted with Family Finance class by grading tests and students' budgets, ran visual equipment, presented lectures and determined grades. Taught food consumerism and personal finances classes at community colleges in Coffeyville, Independence and Colby. Developed proposal for consumer education class at Colby Community College in northwest Kansas.
- **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 offered at the prison. One has been available every semester since that time.

HONORS AND AWARDS

National

- *Ignite Session*, Selected for National Extension Pre-Conference Workshop, Association for Financial Counseling & Planning Education (AFCPE®), November 2021
- *Ignite Session*, Selected for National Extension Pre-Conference Workshop, Association for Financial Counseling & Planning Education (AFCPE®), November 2018
- *Dean Don Felker Financial Management Award*, National Extension Association of Family and Consumer Sciences, 1st Place *National Award* for Solid Finances (with Joel Schumacher and Extension Agents), September 2013.
- *Epsilon Sigma Phi National Extension Honorary-Distinguished Service Award*, October 2010.
- *Continued Excellence Award*, National Extension Association of Family & Consumer Sciences, October 2009.
- *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.
- *Florence Hall Award*, National Extension Association of Family and Consumer Sciences, along with Vogel, Bailey, Lynn, Johnson, Oelkers, Friedrich, and Roos, Montana Alzheimer's Series, October 2006.
- *Educational Technology*, Third Place, National Association of Family and Consumer Science, Financial Management (Glenn Muske and Vukonich), 2000.
- *Financial Management Award*, National Association of Extension Home Economists, (with Bernie Mason), 1991.
- *Impact 2000 Award*, Getting It Together Research Study, USDA, (with Raeann Pourroy), 1990.
- *Impact 2000 Award*, Estate Planning Research Study, USDA, 1988.
- *Showcase of Excellence*, Interactive Newsletter Series, National Association of Extension Home Economists, Chicago, 1990.
- Outstanding Young Women of America, 1986.
- Education Professions Development Act Fellowship, Kansas State University, 1972-1973.

Regional

- *2022 Western Distinguished Team Award*, Epsilon Sigma Phi, MontGuide Mondays webinar series, October 2022.
- *2021 Western Region Visionary Leadership Award*, Epsilon Sigma Phi, National Extension Honorary, October 2021
- *2017 Western Region Excellence in Extension Award*, Cooperative Extension, the United States Department of Agriculture (USDA), the National Institute of Food and Agriculture and Association of Public and Land-grant Universities, November 2017.
- *First Place, Dean Don Felker Financial Management Award*, National Extension Association of Family and Consumer Sciences, (with Joel Schumacher and Extension Agents), September 2013
- *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.
- *First Place, Dean Don Felker Financial Management Award* along with six Extension Agents, “Get Smart About Credit,” National Extension Association of Family & Consumer Sciences, October 2006.
- *First Place, Western Region, Florence Hall Award*, National Extension Association of Family and Consumer Sciences, with Vogel, Bailey, Lynn, Johnson, Oelkers, Friedrich, and Roos, “Caregiving for Montanans,” October 2006.
- *First Place, Western Region, Dean Don Felker Financial Management Award*, National Extension Association of Family & Consumer Sciences, “Teach Children to Save,” October 2005.
- *First Place, Southern Region, Educational Technology*, National Association of Family and Consumer Sciences, “Financial Management Self-Learning Website,” (Muske and Vukonich), 2000.
- *Regional Qualifying Program*, Western Extension Director’s Awards for Excellence, “Planning for Passing of Agricultural Reservation Land to Avoid Further Fractionation under the American Indian Probate Reform Act (AIPRA) of 2004” 2000.
- *First place, Western Region Financial Management Award*, National Association of Extension Home Economists (NAEHE), “Using a Financial Calculator Results to Make Decisions,” (Mason), 1991.
- *First place, Western Region Communication and Media Award*, Financial Management, (Pourroy), National Association of Extension Home Economists (NAEHE), “Getting Your Household in Order Newspaper Series,” 1990.

Montana

- *Distinguished Team Award*, Epsilon Sigma Phi, Fabulous Fridays webinar series, October 2022.
- *Community Leader Award*, AARP Montana, October 2021
- *Visionary Leadership Award*, Montana Alpha Chapter of Epsilon Sigma Phi, October 2020.
- *Distinguished Service Award*, State Bar of Montana, September 2019.
- *Montana 4-H Foundation Hall of Fame*, Montana 4-H Foundation, July 2019.
- *Epsilon Sigma Phi Scholarship*, Alpha Chapter 2019.
- *125 Extraordinary Women of MSU*, Presidents Commission on the Status of University Women, Montana State University, November 2018.
- *Distinguished Service Award*, Montana Association of Family and Consumer Sciences, April 2018.
- *Outstanding Member of the Year*, Montana Gerontology Society, April 2017.
- *Outstanding Professional Award*, Montana Association of Family and Consumer Sciences, April 2016.
- *Team Award*, Epsilon Sigma Phi Alpha Chapter, October 2016.
- *Distinguished Service Award*, Epsilon Sigma Phi, 2010.
- *President's Excellence in Outreach*, 2006.
- *Excellence in Extension*, Montana Association of Family & Consumer Sciences, April 2005.
- *Distinguished Service Award*, Montana Association 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*, Alpha Chapter, Epsilon Sigma Phi, 1993.
- *Distinguished Service Award*, Montana Association of Extension Home Economists, 1993.
- *State Team Award* with Maatta and Muggli, Epsilon Sigma Phi, 1993.
- *State Team Award* with Phillips and Garoutte, Alpha Chapter, 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.

Other States (Iowa & Oklahoma)

- *Alumni Achievement Award*, College of Human Sciences, Iowa State University Ames Iowa, October 2020.
- *Research Excellence Award*, Graduate College, Iowa State University, 1996.
- *Website Development*, Oklahoma Extension Association of Family and Consumer Sciences, 2000.

PUBLICATIONS

Refereed/Peer Reviewed Journal Articles

- Goetting, M, “Open a Montana Medical Care Savings Account for Tax Savings,” (Winter 2017), p. 14, Lives and Landscapes, Montana State University Extension. http://msuextension.org/magazine/assets/docs/MSUext_mag.pdf
- Goetting, M, “Who Gets Your Property When you Die,” (2014) The Standard, Association for Financial Counseling and Planning, Volume 32, page 1. www.afcpe.org
- Goetting, M., “A Living Legacy” (Fall 2014). Big Sky Small Acres, Montana State University Extension.
- Goetting, M, (Spring 2012). “Who Gets Your Property When You Die,” Montana Policy Review, (Spring 2012), p 10-13.
- 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. (Spring 1993). “Talking with Aging Parents about Finances.” 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 Other

- 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. and Mandie Reed (November 2022). “Estate Planning for Parents and Grandparents of Minor Children,” Association for Financial Planning and Counseling Educator’s Symposium, Virtual.
- Goetting, Marsha A. (November 2021). “Alzheimer’s Storybook Program” Association for Financial Planning and Counseling Educator’s Symposium, Virtual.
- Goetting, Marsha A. (November 2019). “Financial and Legal Tools for Caregivers Facing Double Estate/Legacy Planning.” Association for Financial Planning and Counseling Educator’s Symposium, Portland, OR.
- Goetting, Marsha A. (November 2011). “Building Partnerships and Utilizing Technology to Reach Employed Adults.” Association for Financial Counseling and Planning Educators Conference, Jacksonville, FL.
- Goetting, Marsha A. (March 2009). “Estate Planning Interactive Site.” National Extension Risk Management Education Conference, Reno, NV.
- 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. and Mandie Reed (November 2022). "Estate Planning for Parents and Grandparents of Minor Children," Association for Financial Planning and Counseling Educator's Symposium, Virtual.
- Goetting, Marsha A. (November 2021). "MSU Extension Alzheimer's Storybook Program." Association for Financial Counseling & Planning Education, Virtual.
- Goetting, Marsha A. (October 2019). "Financial Planning for Cognitive Impairment." Epsilon Sigma Phi, Colorado Springs, CO.

- Goetting, Marsha A. (November 2018). “*Ignite Session*, Selected for National Extension Pre-Conference Workshop.” Association for Financial Counseling & Planning Education, Norfolk, VA.
- Schumacher, Joel, and Goetting, Marsha A. (November 2011) “Building Partnerships and Utilizing Technology to Reach Employed Adults”, Association for Financial Counseling Planning Education Conference, Jacksonville, FL.
- Goetting, Marsha A. (October 2006), “Alzheimer’s Series,” National Association of Family and 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, GA.
- 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)

- Goetting, Marsha A. (September 2016). "How to Teach Estate Planning at the State and County Level." National Extension Association of Family and Consumer Sciences, Big Sky, Montana.
- Goetting, Marsha A. (November 2011). "Using Response Clickers for Estate Planning Programs." North Dakota Extension Agents, Bismarck, North Dakota.
- Goetting, Marsha A. (November 2010). "Using Response Clickers for Audience Feedback and Interactivity." Association for Financial Counseling and Planning Educators Conference, Denver, Colorado.
- Goetting, Marsha A. (July 2008). "What's the Financial Status of American Women? Perception vs. Reality," National Conference of State Legislatures, New Orleans, Louisiana.
- Goetting, Marsha A. (August 1999). "High School Financial Planning Program Evaluation," National Endowment for Financial Education, Denver, Colorado.
- 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.
- Goetting, Marsha A. (May 1990). "Evaluation and Accountability of Home Economics Programs." Colorado Extension Service, Denver, Grand Junction, Colorado.
- Goetting, Marsha A. (March 1990). "Marketing for the Small-Scale Entrepreneur." Nebraska Cooperative Extension Service, Kearney, Nebraska.
- Goetting, Marsha A. (June 1989). "Marketing Accountability of Home Economics." American Home Economics Association, Annual Meeting, Cincinnati, Ohio.
- Goetting, Marsha A. (February 1989). "Decision Making With a Financial Calculator." Western Regional 4-H Leader's Forum, Billings, Montana.
- Goetting, Marsha A. (December 1988). "Marketing Extension Programs." Idaho Area 4 Agents Conference, Idaho Falls, Idaho.
- Goetting, Marsha A. (September 1988). "Marketing Small Businesses." Western Rural Development Getting Down to Business Conference, Salt Lake City, Utah.
- Goetting, Marsha A. (August 1988). "Marketing Accountability of Extension Programs." Western Region Middle Managers and Evaluators Conference, Albuquerque, New Mexico.
- Goetting, Marsha A. (May 1988). "Emphasizing the Economics of Home Economics." Wyoming Extension Home Economists, Casper, Wyoming.

- Goetting, Marsha A. (March 1987). "Economic Contribution of Home Economics Programs." South Dakota State University, College of Home Economics Faculty, Brookings, South Dakota.
- Goetting, Marsha A. (February 1986). "Montana Families: Taking Control During a Financial Crisis." Western Region Family Economics Human Development Conference, Reno, Nevada.
- Goetting, Marsha A. (November 1985). "Household Economy." Four-State Home Economist Conference (Montana, Wyoming, North Dakota, South Dakota), Billings, Montana.
- Goetting, Marsha A. (August 1984). "Farm and Ranch Property Ownership." National Alpha Gamma Rho Fraternity Conference, Big Sky, Montana.
- Goetting, Marsha A. (March 1984). "Women's Economic Value on the Ranch." American National Cowbells, Region V Workshop, Billings, Montana.
- Goetting, Marsha A. (March 1984). "Household Economy." Washington Extension Service Annual Conference, Pullman, Washington.
- Goetting, Marsha A. (August 1983). "Securing Your Finances." National Association of Extension Homemakers Conference, Laramie, Wyoming.
- Goetting, Marsha A. (September 1982). "Estate Planning for Families with Minor Children." National Association of County Extension Agricultural Agents, Billings, Montana.
- Goetting, Marsha A. (June 1980). "Estate Planning Tools." National Rural Youth Conference, Billings, Montana.
- Goetting, Marsha A. (February 1980). "Farm and Ranch Estate Planning." SOMONO Conference (South Dakota, Montana, North Dakota), Baker, Montana.

EXTENSION POPULAR PUBLICATIONS

MontGuides (Fact Sheets)

- Income Tax Impact While Selling, Gifting, or Leaving Property as an Inheritance, with E. Edwin Eck, January 2022 (New)
- Transferring Your Farm or Ranch to Next Generation, June 2022 (Revised)
- Montana Medical Care Savings Accounts (MSAs) for the 2022 – 2023 Tax Years, June 2022 (Revised)
- Letter of Last Instructions, August 2022, (Revised)
- Accessing a Deceased Person's Financial Accounts, October 2022, (Revised)
- Transfer on Death Deeds in Montana, November 2022, (Revised)
- Non-probate Transfers (Contractual Arrangements, Multiple Party Accounts, POD Designations, TOD Registrations), November 2022 (Revised)
- Quitclaim Deeds in Montana, with Jane Wolery, January 2021 (New)
- Montana Uniform Transfers to Minors Act (UTMA): Custodial Accounts for Children Under Age 21, February 2021 (Revised)
- Montana ABLE Accounts: Achieving a Better Life Experience, March 2021 (Revised)

- Life Estate: A Useful Estate Planning Tool, April 2021 (Revised)
- Medicaid and Long-Term Care Costs, April 2021 (Revised)
- Selecting an Attorney in Montana to Develop an Estate Plan or Administer and Estate (Probate), with Eck, May 2021 (New)
- Using a Homestead Declaration to Protect Your Home from Creditors, (Revised) December 2021
- Personal Representative Responsibilities, September 2021 (Revised)
- Health Care Savings Accounts, with Schumacher, September 2021 (Revised)
- Testamentary Trusts in Montana, with Eck, December 2021 (New)
- Using Trusts in an Estate Plan to provide for Children from Blended Families, with Schumacher July 2021 (New)
- Save Montana Income Taxes with a Charitable Gift Annuity: A Legacy Qualifying for the Montana Endowment Tax Credit (METC), Revised, September 2020
- Financial, Estate, and Health Care Planning Documents for Montanans Concerned About Memory Loss, New, September 2020
- Estate Planning for Families with Minor and/or Special Needs Children, Revised, October 2020.
- Provider Orders for Life-Sustaining Treatment (POLST), Revised, November 2020.
- Revocable Living Trusts, Revised, August 2019.
- Montana End-of-Life Registry, (co-authors Tim Fox; Montana Attorney General and Virginia Knerr, Former Broadwater County Extension Agent), Revised, September 2019.
- Designating Beneficiaries Through Contractual Arrangements, Revised, October 2019.
- Using a Bypass Trust to Provide for Children from Remarried, Step, and Blended Families, (co-author Joel Schumacher, MSU Extension), Revised, November 2019.
- Dying Without a Will in Montana: Who Receives Your Property? Revised, November 2019.
- Montana Common Law Marriage and Estate Planning, Revised, November 2019.
- Gifting: A Property Transfer Tool of Estate Planning, Revised, November 2019.
- Probate in Montana, Revised, November 2019.
- Property Ownership, Revised, November 2019.
- Glossary of Estate Planning Terms, Revised December 2019.
- Helping Friends Cope with Financial Crisis (co-author Sandy Bailey, MSU Extension), Revised January 2019.
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- Goetting, M., “*Perks of Medical Savings Accounts*,” Missoulian. (December 2, 2018).

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- Goetting, M., "MSAs, Elderly Homeowner/Renter Tax Credit," KGEZ-Kalispell. (September 20, 2018).
- Goetting, M., "Wills, Payable on Death Designations, TOD," KGEZ-Kalispell. (September 20, 2018).
- Goetting, M., "Legal and Financial Resource Packet for Caregivers," KGEZ-Kalispell. (August 17, 2018).
- Goetting, M., "New Model Health Care Power of Attorney Form Addresses Alzheimer's Patients' Needs," (August 2018), Montana Lawyer.
- Goetting, M., "MSU Extension offers new legal and financial packet for caregivers of those with memory loss," Montana State University News Service. (July 16, 2018).
- Goetting, M., "Who Gets Grandma's Yellow Pie Plate," KGEZ-Kalispell. (July 18, 2018).
- Goetting, M., "Financial Power of Attorney," KGEZ-Kalispell. (July 18, 2018).
- Goetting, M., "Legal and Financial Resource Packet for Caregivers," Northern New Network. (July 20, 2018).
- Goetting, M., "Montana Medical Care Savings Accounts," Aging Horizons-SWX Channel 199. (July 21, 2018).
- Goetting, M., "Montana Medical Care Savings Accounts," Aging Horizons-SWX Channel 199. (July 7, 2018).
- Goetting, M., "Communicating About Estate Planning and Finances," (April 2018), (July 2018), Montana Family Forest News
- Goetting, M., "Estate Planning for Families with Minor and/or Special Needs Children," (July 2018), (July 2018), Lives and Landscapes
- Goetting, M., "Financial Decisions as We Age," KGEZ-Kalispell. (March 14, 2018).
- Goetting, M., "Montana Body Donation Program," KGEZ-Kalispell. (July 18, 2018).
- Goetting, M., "Who Gets Grandma's Yellow Pie Plate," KGEZ-Kalispell. (July 18, 2018).
- Goetting, M., "MSU Extension Releases new MontGuide about the Montana Body Donation Program," Montana State University News Service. (April 5, 2018).
- Goetting, M., "Savings Tips to Help You Achieve Your Goals," KGEZ-Kalispell. (February 16, 2018).

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- Goetting, M., "Open a Montana Medical Care Savings Account for Tax Savings," (Winter 2017), p. 14, Lives and Landscapes, Montana State University Extension.
- Goetting, M., Sutton, Jackie, "Gifting: A living legacy and gift taxes," Dillon Tribune Insert. (December 6, 2017).
- Goetting, M., Sutton, Jackie, "Achieving a Better Life Experience Accounts (ABLE)," KGEZ Kalispell. (November 28, 2017).
- Goetting, M., Sutton, Jackie, "Gifting while alive vs. a bequest after death," KGEZ Kalispell. (November 28, 2017).
- Goetting, M., Sutton, Jackie, "Giving Away Personal Items as Holiday Gifts," Dillon Tribune Insert. (November 22, 2017).
- Goetting, M., Sutton, Jackie, "Montana Medical Care Savings Accounts," Dillon Tribune Insert. (November 15, 2017).
- Goetting, M., Sutton, Jackie, "How to transfer property held in joint tenancy to the survivor," Dillon Tribune Insert. (November 8, 2017).

- Goetting, M., Sutton, Jackie, “*How title affects who receives property at your death,*” Dillon Tribune Insert. (November 1, 2017).
- Goetting, M., Sutton, Jackie, “*Communicating about Estate Planning,*” Dillon Tribune Insert. (October 25, 2017).
- Goetting, M., Sutton, Jackie, “*Beneficiary Deeds,*” Dillon Tribune Insert. (October 18, 2017).
- Goetting, M., Sutton, Jackie, “*Power of Attorney,*” Dillon Tribune Insert. (October 11, 2017).
- Goetting, M., Sutton, Jackie, “*Dying Without a Will,*” Dillon Tribune Insert. (October 1, 2017).
- Goetting, M., “*Open a Montana Medical Care Savings Account (MSA) Before December 29, 2017 for tax savings,*” Lives and Landscapes. (September 2017).
- Goetting, M., “*Beneficiary deeds and Death Taxes,*” Montana AgLive. Television panel (September 24, 2017).
- Goetting, M., “*First Time Home Buyer Accounts,*” KGEZ Kalispell. (September 13, 2017).
- Goetting, M., “*Estate planning for farmers,*” PNC Agricultural Newsletter. (August 15, 2017).
- Goetting, M., “*Montana Medical Care Savings Accounts,*” KGEZ Kalispell. (August 10, 2017).
- Goetting, M., “*Estate Planning for Pets,*” KGEZ Kalispell. (July 27, 2017).
- Goetting, M., “*Gifts to the Montana 4-H Foundation and Experience Amazing Tax Savings from the Montana Endowment Tax Credit,*” Montana 4-H Foundation. (June 2017).
- Goetting, M., “*Transferring Joint Tenancy Real Property Without Probate,*” Big Sky Acres. (May 2017).
- Goetting, M., “*Estate planning aspects of property ownership,*” KGEZ Kalispell. (May 4, 2017).
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- Goetting, M., “*Legacy Planning,*” KGEZ Kalispell. (April 26, 2017).
- Goetting, M., “*Probate avoidance tools,*” KGEZ Kalispell. (March 16, 2017).
- Goetting, M., “*Montana Legacy (Bequest) Tools,*” MSU Alumni Foundation. (March 3, 2017).
- Goetting, M., “*Basic Estate Planning Workshop Coming To Sanders County,*” Sanders County Ledger. (February 2017).
- Goetting, M., “*Using Contracts as a Part of Your Estate Plan,*” Sanders County Ledger. (February 2017).
- Goetting, M., “*Montana's 120-hour survival requirement for heirs,*” KGEZ Kalispell. (February 16, 2017).
- Goetting, M., “*MSU Extension offers information for seniors on Montana Homeowner/Renter Tax Credit,*” MSU Communication Services. (February 10, 2017).
- Goetting, M., “*How the Montana Endowment Tax Credit Could Benefit the Montana 4-H Program,*” Montana 4-H Foundation. (January 2017).
- Goetting, M., “*Transferring Joint Tenancy Real Property Without Probate,*” Big Sky Acres. (January 26, 2017).
- Goetting, M., “*Money Management Ideas,*” KGEZ Kalispell. (January 17, 2017).

2016

- Goetting, M., “*My IRA,*” KGEZ-Kalispell, Radio, January 5, 2016.
- Goetting, M., “*Avoid Probate of Real Property with a Montana Beneficiary Deed,*” Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, January 15, 2016.
- Goetting, M., “*Home Equity and Reverse Mortgages: Advantages and Disadvantages,*” KGEZ-Kalispell, Radio, February 9, 2016.
- Goetting, M., “*What Parents with Minor Children Should Know About Estate Planning,*” Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, February 15, 2016.

- Goetting, M., “*Credit Card Debt*,” KGEZ-Kalispell, Radio, March 9, 2016.
- Goetting, M., “*Creative Giving Plans to Support MSU*,” Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, February 15, 2016.
- Goetting, M., “*How Beneficiary Deeds Avoid Probate*,” KGEZ-Kalispell, Radio, April 6, 2016.
- Goetting, M., Montana Community Access Television (TV), Taped Estate Planning program sponsored by Montana Aging Services, AARP Montana, and Montana Geriatric Center of the University of Montana, April 13, 2016.
- Goetting, M., “*Probate*,” Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, October 28, 2016.
- Goetting, M., “*The Tale of Champ and the Montana Endowment Tax Credit*,” MSU Alumni Foundation, May 15, 2016.
- Goetting, M., “*What Are Your Rights Over your Remains in Montana*,” KGEZ-Kalispell, Radio, June 29, 2016.
- Goetting, M., “*Life Estates, Joint Tenancies and Tenancy in Common*,” KGEZ-Kalispell, Radio, July 25, 2016.
- Goetting, M., “*Gifts of Stocks and Mutual Funds*,” MSU Alumni Foundation, August 15, 2016.
- Goetting, M., “*Trusts: Living and Testamentary*,” KGEZ-Kalispell, Radio, July 25, 2016.
- Goetting, M., “*Wills*,” KGEZ-Kalispell, Radio, September 29, 2016.
- Goetting, M., “*Death Taxes: Much ado About Nothing for 99% of Montanans*,” MSU Alumni Foundation, October 15, 2016.
- Goetting, M., “*Wills*,” KGEZ-Kalispell, Radio, September 29, 2016.
- Goetting, M., “*MSU Extension Offers News MontGuide on Transferring Montana Vehicle Title After Death of Owner*,” MSU Communication News Services, November 11, 2016.
- Goetting, M., “*How Champ Uses the Montana Endowment Tax Credit*,” MSU Alumni Foundation, November 15, 2016.
- Goetting, M., “*Saving vs. Credit*,” KGEZ-Kalispell, Radio, November 29, 2016.
- Goetting, M., “*MSU Check Register Tracking System—Try It You’ll Like It*,” MSU Communication News Services, December 5, 2016.
- Goetting, M., “*To Have a Trust or Not to Have a Trust...That is the Question*,” MSU Alumni Foundation, December 15, 2016.

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- Goetting, M., “*Dying Without a Will in Montana*,” Bozeman Daily Chronicle, January 20, 2015.
- Goetting, M., “*Intergenerational Estate Planning*,” Agweek Magazine, Grand Forks, ND, January 22, 2015.
- Goetting, M., “*Montana’s Elderly May Be Eligible for 2014 Homeowner/Renter Tax Credit for a Portion of Their Property Taxes or Rent Paid, Based on Their Income*,” MSU News Service, January 27, 2015.
- Goetting, M., “*How Property is Titled Affects Transfer at Death*,” Missoulian, April 2, 2015.
- Goetting, M., “*How Property Titled Affects Who Receives it After You Die*,” Montana Family Forest News, April 15, 2015.
- Goetting, M., “*The Power of Property Titles*,” Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, July 17, 2015.
- Goetting, M., “*Using Contracts as a Part of Your Estate Plan*,” Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, August 15, 2015.
- Goetting, M., “*Montana Medical Care Savings Accounts (MSA)—An Overlooked Estate Planning Tool*,” Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, September 15, 2015.

- Goetting, M., *“Dying Without a Will,”* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, October 15, 2015.
- Goetting, M., *“Power of Attorney,”* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, November 15, 2015.
- Goetting, M., *“Open a Montana Medical Savings Account before Dec 31 for 2015 tax savings,”* MSU News Service, November 25, 2015.
- Goetting, M., *“Gifting: A Living Legacy,”* Estate, Trust, and Gift Planning Newsletter, MSU Alumni Foundation, December 15, 2015.

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- Goetting, M., *“Montana Youth Savings Lessons and \$100 Price Drawing Available,”* MSU News Service, November 2014.
- Goetting, M., *“Open a Montana Medical Savings Account before December 31 for 2014 Tax Savings,”* MSU News Service, November 2014.
- Goetting, M., *“Communicating About Estate Planning and Finances Easier said than done,”* Big Timber Pioneer Press, July 2014.
- Goetting, M., *“Succession and Transfer Planning for the Next Generation of Montana Farmers and Ranchers,”* Big Timber Pioneer Press, June 2014.
- Goetting, M., *“Estate Planning and Montana’s Long-Term Care Partnership Program,”* Big Timber Pioneer Press, May 2014.
- Goetting, M., *“Power of Attorney,”* Big Timber Pioneer Press, April 2014.
- Goetting, M., *“Death Taxes: Much ado about nothing or more than 99% of Montanans,”* Big Timber Pioneer Press, March 2014.
- Goetting, M., *“Why Probate,”* Big Timber Pioneer Press, February 2014.
- Goetting, M., *“After Holiday’s Buyer’s Remorse and How to Deal with the Resulting Stress,”* MSU News Services, February 2014.
- Goetting, M., *“Seniors Should Apply for Montana Homeowner/Renter Tax Credit,”* MSU News Services, February 2014.
- Goetting, M., *“Have the foresight to make an estate plan”* MSU News Services, January 2014.
- Goetting, M., *“Free Extension information helps Montanans know what happens if they die without a will”* MSU News Services, January 2014.
- Goetting, M., *“How title affects who receive it after you die”* Big Timber Pioneer News, January 2014.
- Goetting, M., *“Power of Attorney”* Aging Horizons Department of Public Health and Human Services, January 2014.
- Goetting, M., *“What are some of the consequences of holding property in joint tenancy with relatives”* Aging Horizons Department of Public Health and Human Services, January 2014.
- Goetting, M., *“What is a separate listing of tangible personal property and how can it benefit you”* Aging Horizons Department of Public Health and Human Services, January 2014.
- Goetting, M., *“How Payable on Death Designations and Transfer on Death Registrations can help you avoid probate”* Aging Horizons Department of Public Health and Human Services, January 2014.
- Goetting, M., *“How Beneficiary Deeds for Real Property Can Avoid Probate”* Aging Horizons Department of Public Health and Human Services, January 2014.

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- Goetting, M., “*Seniors Encourage to Apply for Montana Homeowner/Renter Tax Credit*,” MSU News Service, February 2013.
- Goetting, M., “*Transferring Your Farm or Ranch to Next Generation*”, Dillon Tribune, March 2013.
- Goetting, M., “*Dying Without a Will*” Big Timber Pioneer, September 2013.
- Goetting, M., “*Transferring Your Farm or Ranch to Next Generation*” with Jesse Fulbright Liberty County, October 2013.
- Goetting, M., “*What Parents with Minor Children Should Know About Estate Planning*”, Big Timber Pioneer, October 2013.
- Goetting, M., “*Beneficiary Deeds in Montana*”, Big Timber Pioneer, November 2013.
- Goetting, M., “*MSU Extension Offers Advice on Tax Benefits of Medical Care Savings Accounts before Dec. 31*,” MSU News Service, November 2013.
- Goetting, M., “*Montana Medical Care Savings Account (MSA): An Estate Planning Tool*, Big Timber Pioneer, November 2013.
- Goetting, M., “*Using Contracts as Part of Your Estate Plan*”, Big Timber Pioneer, December 2013.

2012

- Goetting, M., “Seniors Should Apply for Montana Homeowner Renter Tax Credit” News Release from MSU Communication Services, January 26, 2012.
- Provided information to Carly Flandro, Bozeman Chronicle for article, “From One Generation to Next” February 3, 2012.
- Provided information to Lisa Schmidt for article “Five Simple Tips to Start Planning Your Estate” Western Ag Reporter, March 12, 2012.
- “Who Gets Your Property When You Die,” Montana Policy Review, Volume 16, No. 1, Spring 2012.
- “Back to the Basis Financial Advice” interviewed by Laura Tode for MAGIC Billings City Magazine, May 2012, p. 108.
- “MSU Extension Offers New Guide on Long-Term Care Insurance” News Release from MSU Communication Services, June 21, 2012.
- “Long-Term Care Partnership Insurance Program” Montana Pioneer, July 2012.
- “POLST Guide Available” The Roundup, Summer 2012.
- “Using a Homestead Declaration to Protect Your Home from Creditors” Big Sky Acres, Winter 2012.
- “Transferring Your Farm or Ranch to the Next Generation” co-author Jesse Fulbright (Liberty County Extension Agent), Great Falls Tribune, November 14, 2012.

2011

- Goetting, M., “Power of Attorney MontGuide now available from Montana State University Extension”, November 2011.
- Goetting, M. Central Montana Foundation and Medical Center Foundation, The Roundup, Winter 2011, Brief Power of Attorney article.
- Goetting, M., “Track’n Your Savings Helps Organize Financial Goals”, February 22, 2011.
- Goetting, M., “Resources for Flood Victims”, Montana Credit Unions for Community Development, Together We Can Make a Difference, Vol. 2, issue 6, June 2011.
- New MSU Guide on Power of Attorney, The Montana Lawyer, December 2011/January 2012.

- The Standard, AFCPE 2nd Quarter 2011, Volume 29, Number 2. Medical Care Savings Account, brief side bar mentions Montana MSAs.

2010

- Goetting, M., AG Outlook, Great Falls Tribune, “All in the Family: Planning is the Key to Keeping the Farm or Ranch for the Next Generation,” Winter 2009 (Published in 2010).
- Goetting, M., Mountain Pacific Quality Health Dear Betty Column, “Beneficiary Deeds,” February 2010.
- Goetting, M., Sidney Herald, “Utilizing a Beneficiary Deed,” March 2010.
- Goetting, M., Montana Credit Unions for Community Development, Vol. 1, Issue 4, “Get a Grip on Your Money,” August 2010.
- Goetting, M., The Roundup-Published by Central Montana Foundation Medical Center Foundation, “MSU Offers a New Guide to Help Survivors Settle an Estate,” Fall 2010.
- Goetting, M., Billings Gazette, “State Medical Accounts,” December 2010.

2009

- Goetting, M., The Roundup, “Beneficiary Deeds Can Be Used to Transfer Property to Charitable Organizations,” Winter 2009.
- Goetting, M., MSU News Service, “Free Estate Planning Workshops set in Golden Triangle Feb 3 – 5,” January 2009.
- Goetting, M., MSU News Service, “Seniors Should Apply for Homeowner/Renter Tax Credit,” January 2009.
- Goetting, M., MSU News Service, “Free Extension Information Helps Montanans Know What Happens Without a Will,” January 2009.
- Goetting, M., MSU News Service, “Montanans Can Use Extension Resources to Get a Grip on their Money,” February 2009.
- Goetting, M., MSU News Service, “Small Steps Can Improve Your Health and Wealth,” March 2009.
- Goetting, M., MSU News Service, “Open a Montana Medical Care Savings Account before Dec. 31 for 2009 tax savings,” October 2009.
- Goetting, M., MSU News Service, “Fall, Winter, Estate Planning Webinars Scheduled”, October 2009.
- Goetting, M., Great Falls Tribune (Peter Johnson), “Planning is key to keeping the farm or ranch for coming generations,” Winter 2009.

2008 (note clipping service ended in 2008 so no way to determine number of papers who printed article)

- 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.

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 2007, 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

2005 - (4 articles published in 32 newspapers)

- Earned Income Credit Rewards Lower Income Worker, February 2005, Published in 2 newspapers
- Save Money with the Elderly Homeowner/Renter Credit, February 2005, Published in 2 newspapers
- Rights of the Terminally Ill Often Misunderstood in Montana: Living Will Facts and Forms are free on the web, March 2005, Published in 18 newspapers.
- Open a Medical Care Savings Account Before December 31 for 2005 Tax Savings, December 2005. Published in 10 newspapers

2004 - (9 articles published in 58 newspapers)

- Save Money with the Elderly Homeowners/Renter Credit, January 2004, Published in 7 newspapers

- Bad Financial Habits Can Start Very Early in Children, April 2004, Published in 8 newspapers
- Programs Throughout Montana Teach Children to Save, April 2004, Published in 6 newspapers
- The Best Time to Plan One's Estate? Now! August 2004, Published in 9 newspapers
- Are you Over your Head in Debt? October 2004, Published in 10 newspapers
- Avoid the Minimum Payments Trap, October 2004, Published in 2 newspapers
- Get Smart About Using a Financial Calculator, October 2004, Published in 5 newspapers
- Get Smart About Selecting a Credit Card, October 2004, Published in 4 newspapers
- Paying Debts of Sooner, October 2004, Published in 7 newspapers

2003 - (7 articles published in 41 newspapers)

- Save Money with the Elderly Homeowners/Renter Credit, January 2003. Published in 4 newspapers
- Save Thousands with a \$ Budgeting Tool, January 2003. Published in 7 newspapers
- Get Your Red-Hot Earned Income Tax Credit, January 2003. Published in 3 newspapers
- Use Homestead Declaration to Protect Equity in Your Home, February 2003. Published in 11 newspapers
- Accessing a Deceased Person's Financial Accounts, April 2003. Published in 11 newspapers
- IRAs: Keep a Little Gold for Those Golden Years, April 2003. Published in 3 newspapers
- Open a Medical Care Savings Account Before December 31 for 2003 Tax Savings, December 2003. Published in 2 newspapers

2002- (11 articles published in 65 newspapers)

- Early/Homeowner Renter Tax Credits, January 2002. Published in 4 newspapers.
- Death Tax or No, the Tough Questions Remain, January 2002. Published in 14 newspapers.
- Protecting Your Home from Creditors, January 2002. Published in 3 papers.
- Montanans Asking About Patriot Bonds, January 2002. Published in 8 newspapers.
- Money, Money, Money: Where does it all go? February 2002. Published in 2 newspapers.
- Cremation is Popular in Montana, April 2002. Published in 3 newspapers.
- CDs are A-OK for the Safe Investor, July 2002. Published in 3 newspapers.
- How to be a Friend Indeed to a Friend in Need, July 2002. Published in 10 newspapers.
- Rubber Duckies is College Fund: How to Build for Baby's Bachelor's, September 2002. Published in 4 newspapers.
- A Financial Calculator for Christmas? Pair it with a Guide that Teaches Financial Savvy, December 2002. Published in 7 newspapers.
- Open a Medical Care Savings Account before December 31 for 2002 Tax Savings, December 2002. Published in 7 newspapers.

2001- (13 articles published in 101 newspapers)

- Publication looks at options within Medicaid & Long-Term Care, January 2001. Published in 10 newspapers.
- Protect Your Family with Wise Estate Planning, January 2001. Published in 11 newspapers.
- If Over 62, Don't Miss Your Elderly Housing Credit, February 2001. Published in 7 newspapers.
- Plan Now to Finance Your Child's College Education, February 2001. Published in 6 newspapers.

- Pay Less Tax with Earned Income Tax Credit, February 2001. Published in 9 newspapers.
- Developing a Spending Plan Recommended, April 2001. Published in 4 newspapers.
- Extension Publication Investigates Short-Term Loans, April 2001. Published in 9 newspapers.
- Who Gets Grandma's Yellow Pie Plate? May 2001. Published in 1 newspaper.
- Is Rent to Own Right for You? September 2001. Published in 2 newspapers.
- Using a Homestead Declaration to Protect Your Home from Creditors. October 2001. Published in 2 newspapers.
- December 31 Deadline on Montana Medical Care Savings Account Deposits. December 2001. Published in 15 newspapers.
- Free Guide Helps you Track Your Budget. December 2001. Published in 11 newspapers.
- Could a Montana First-Time Home-Buyer Savings Account Help You. January 2000. Published in 14 newspapers.

2000 - (12 articles published in 93 newspapers)

- Montana's Elderly Homeowner/Renter Credit. February 2000. Published in 5 newspapers.
- Transferring Your Farm or Ranch to the Next Generation – How to Get Started. February 2000. Published in 13 newspapers.
- Transferring Non-Titled Property in Montana. March 2000. Published in Anaconda Leader.
- Transferring Your Farm or Ranch to the Next Generation – Identifying What's Important. March 2000. Published in 10 newspapers.
- Transferring Your Farm or Ranch to the Next Generation – Is it the Right Time to Transfer? March 2000. Published in 9 newspapers.
- Transferring Your Farm or Ranch to the Next Generation – Property Ownership and Business Structure. April 2000. Published in 7 newspapers.
- Transferring Your Farm or Ranch to the Next Generation – What Parents Can Do. April 2000. Published in 14 newspapers.
- High School Financial Planning Program Helps Teens Prepare for Real World. November 2000. Published in 16 newspapers.
- Custodial Accounts: One Option for Transferring Assets to Kids Under 21. September 2000. Published in 2 newspapers.
- December 31 is Deadline for Montana Tax Savings. December 2000. Published in 9 newspapers.
- Do Americans Abuse their Credit? December 2000. Published in 7 newspapers.
- Free Guide Helps You Track Your Budget. December 2000. (Numbers not yet available.)

1999 - (17 articles published in 114 newspapers)

- Interested in Paying Less Tax. January 1999. Published in 13 newspapers.
- Tax Credit Available for the Elderly. February 1999. Published in 13 newspapers.
- Estate Planning Tips: How to Use Contractual Arrangements to Transfer Your Property. March 1999. Published in 16 newspapers.
- Protect Your Home from Creditors. March 1999. Published in 19 newspapers.
- A New Publication Lets Divorced Montanans Help Others Facing Divorce. July 1999. Published in 10 newspapers.
- High School Financial Planning Program Helps Teens Prepare for Real World. September 1999. Published in 10 newspapers.

- Custodial Accounts—One Option for Transferring Assets to Kids Under 21. September 1999. Published in 15 newspapers.
- Discover Where the Money Goes. October 1999. Published in 3 newspapers.
- Developing a Spending Plan. October 1999. Published in 2 newspapers.
- Don't Give Up on Financial Goals. October 1999. Published in 2 newspapers.
- Take Control of Credit Use. October 1999. Published in 2 newspapers.
- Gifts to Lessen Financial Strain. October 1999. Published in 2 newspapers.
- \$36,000 in Prize Money Available to Montana High School Students through High School Financial Literacy Award. November 1999. Published in 3 newspapers.
- Over-Indulgence Can Burden Your Millennium with Devastating Debt. December 1999.
- Dec. 31 Deadline for Montana Tax Savings," December 1999.
- Transferring Your Farm or Ranch to Next Generation. Co-authored with Suzi Taylor; column in *Beef Questions and Answers* newsletter, December 1999.
- DPHHS Collaborates with MSU Extension Service on Helpful Guides. Department of Public Health and Human Services column, December 1999.

1998 - (16 articles published in 125 newspapers)

- Getting Out of Debt. January 1998. Published in 3 newspapers.
- Help Available for Estate Planning. January 1998. Published in 4 newspapers.
- Transferring Your Farm or Ranch to the Next Generation. January 1998. Published in 14 newspapers.
- Developing a Spending Plan. January 1998. Published in 1 newspaper.
- Who Gets Grandma's Yellow Pie Plate?" February 1998. Published in 11 newspapers.
- Tony the Tiger's Crowd Says Buy This. March 1998. Published in 5 newspapers.
- Learn the Lingo and Protect Yourself When Investing. March 1998. Published in 4 newspapers.
- Whether You Make \$15,000 or \$150,000; Set Realistic Financial Goals. March 1998. Published in 5 newspapers.
- Elderly Homeowners/Renters May be Available to Get Tax Credit. March 1998. Published in 13 newspapers.
- Money 2000. April 1998. Published in 14 newspapers.
- Freeze Your Debt special feature page with Joan Naines. April 1998, Bozeman Daily Chronicle.
- Estate Planning On-line. May 1998. Published in 11 newspapers.
- Wills - Special Feature Page with Mary Pickett. June 1998, Billings Gazette.
- Is Rent-to-Own Right for You? September 1998. Published in 9 newspapers.
- Pay Less Montana Income Tax by Establishing a Medical Care Savings Account. October 1998. Published in 25 newspapers.
- What Should I Know About IRAs? October 1998. Published in 4 newspapers.

1997 -(8 articles published in 80 newspapers)

- Extension Service Offers Confidential, Free, Get-Out-Of-Debt Planning. January 1997. Published in 15 newspapers.
- Estate Planning: It's Never Been Easier to Begin. January 1997. Published in 8 newspapers.
- Who Gets Grandma's Yellow Pie Plate? April 1997. Published in 10 newspapers.
- How Will You Organize Your New Business? October 1997. Published in 8 newspapers.

- Transferring Your Farm or Ranch to the Next Generation: New Publication Shows How to Make a Difficult Process Easier. November 1997. Published in 16 newspapers.
- Elderly Homeowner/Renter Credit. February 1997. Published in 5 newspapers.
- Vacation Season Good Time to Get Will in Order. August 1997. Published in 7 newspapers.
- What Can You Afford? May 1997. Published in 11 newspapers.

INSTRUCTIONAL ACTIVITIES

Extension Presentations (including Webinars)

Year	Number of Classes	Number of Participants	Subjects
2022	50	4,988	Accessing a Deceased Person’s Financial Accounts, Alzheimer’s and the Storybook Program, Avoiding Probate on Your Estate and Save Money, Double Estate Planning for Caregivers, Estate Planning: Getting Started, Estate Planning and Farm Succession Planning, Estate Planning for Parents and Grandparents Raising Minor Children, Estate Planning for Parents with Minor Children, Estate Planning: Challenging Decisions, Estate Planning for Community Foundations, Estate Planning for Forestry Landowners, Estate Planning: What Landlords Need to Know, Estate Planning for New Montanans, Estate Planning for Every Montanan, Estate Planning for Young Couples, Estate Planning for Ranchers, Financial Planning for Memory Loss, Financial, Estate, and Health Care Planning Documents for Montanans, How the Use of Joint Tenancies Can Disinherit Your Kids, Letter of Last Instruction, My Loved One Passed Away, Now What?, Montana Tools for Avoiding Probate, Property Ownership, Selecting an Attorney in Montana to Develop an Estate Plan, Should I Gift While I am Alive or Leave a Bequest After I Die, Revocable and Testamentary Trusts, Thin You Know Who Gets Your Property When You Die? Think Again, Tools for Avoiding Probate on Your Assets and Save Money for Your Beneficiaries, Using an IRA as an Estate/Legacy Tool, What You Can Do With a Will and What You Can’t, What Women Need to Know about Estate Planning, Wills, Trusts, and Estates, What You Can did With a Will and What You Can’t, Who Gets Your Property When You Die?, Who Gets Grandma’s Yellow Pie Plate?

Year	Number of Classes	Number of Participants	Subjects
2021		4,486	Basics of Estate Planning, Beneficiary Designation to Avoid Probate, Changes in Montana Laws: Estate/Legacy Planning, Joint Tenancy with Right of Survivorship, Distributing Personal Property, Dying without a Will in Montana, Estate Planning for Every Montanan, Equality vs. Equity in Estate Planning, Farm and Ranch Transition Planning, Financial and Health Care Power of Attorney, Gift or Not to Gift , Important Decisions and Tough Conversations, Legal, Montana Medical Care Savings Account, Montana Endowment Tax Credit, Property Wills, Trusts 101, Powers of Attorney, Whose name is on your assets/property?
2020		3,983	Basics of Estate Planning, Beneficiaries 101, Beneficiary Designation to Avoid Probate, Changes in Montana Laws: Estate/Legacy Planning, Joint Tenancy with Right of Survivorship, Distributing Personal Property, Dying without a Will in Montana, Estate Planning for Farmers and Ranchers, Estate Planning for Every Montanan, Equality vs. Equity in Estate Planning, Farm and Ranch Transition Planning, Financial and Health Care Power of Attorney , Gift or Not to Gift , Important Decisions and Tough Conversations, Legal Tools for the Early Stages of Alzheimer's Dementia or other Cognitive Memory Issues, Montana Medical Care Savings Account, Montana Endowment Tax Credit, Property Wills, Trusts 101, Powers of Attorney, What Owners of Forest Lands Need to Know about Estate Planning, Whose name is on your assets/property?, Wills, Trusts, Probate
2019	53	1,566	Legal and Financial Steps to Take Before and After Diagnosis of Alzheimer's, Living Trusts, Montana Endowment Tax Credit, Montana Medical Care Savings Accounts, Payable on Death Designations, Probate, Property Ownership, Transfer on Death Deeds, Transfer on Death Registrations, Who Gets Your Property When You Die, Wills

Year	Number of Classes	Number of Participants	Subjects
2018	77	1,990	Beneficiary Deeds, Legal and Financial Steps to Take Before and After Diagnosis of Alzheimer's, Living Trusts, Montana Endowment Tax Credit, Montana Medical Care Savings Accounts, Payable on Death Designations, Probate, Property Ownership, Transfer on Death Registrations, Who Gets Your Property When You Die, Wills
2017	60	1,840	Beneficiary Deeds, Legal and Financial Steps to Take Before and After Diagnosis of Alzheimer's, Living Trusts, Montana Endowment Tax Credit, Payable on Death Designations, Probate, Property Ownership, Transfer on Death Registrations, Who Gets Your Property When You Die, Wills
2016	76	2,846	Beneficiary Deeds, Charitable Giving, Montana Endowment Tax Credit, Living Trusts, Long-Term Partnership Insurance, Payable on Death Designations, Probate, Property Ownership, Transfer on Death Registrations, What Are Your Rights Over Your Remains, Who Gets Your Property When you Die, Wills
2015	50	1,331	Estate planning, payable on death designations, transfer of death registrations, property ownership, federal estate and gift taxes, beneficiary deeds, who gets your property when you die, Montana intestacy statutes, probate, personal representatives, homestead allowances, wills, and living trusts.
2014	36	2,240	Estate Planning, Medical Care Savings Accounts, Provider Orders for Life Sustaining Treatment (POLST), Medicaid and Long-Term Care Costs, Long-Term Care Partnership Insurance in Montana, How Title Affects Who Receives Your Property Upon Death, With or Without a Will, Advanced Directives: What Are They and Why Should You Have Them, Montana Saves Scavenger Hunt ages 11-14, Montana Saves Scavenger Hunt ages 15-19.

Year	Number of Classes	Number of Participants	Subjects
2013	44	2,908	Estate Planning: the Basics, Estate Planning for Landlords, Estate Planning for Married Couples Without Children, Estate Planning for Singles, Estate Planning Tools that Avoid Probate, Estate Planning for Young Farm Ranch Couples, Families, Legacies & Estate Planning, Get a Grip on Your Money, Passing the Family Farm, Probate, Personal Representatives, Property Titles, Retirement Planning for Those 3 to 5 years from Retirement, Talking With Aging Parents About Finances, Transferring Your Farm or Ranch to Next Generation, What Married Couples With Children Need to Know About Estate Planning, Who Gets Your Property When You Die, Why Estate Planning is Important to Family Business Owners
2012	59	1,997	American Indian Probate Reform Act (AIPRA), Avoiding Probate, Cremation, Dying Without a Will, Estate Planning for Farmers, Estate Planning for Townees, Estate Planning for Gays and Lesbians: What They and Their Families Should Know, Estate Planning for Young Families, Estate Planning for Retirees, Get a Grip on Your Money, Gifting, Grandparents: What They Should Know About Estate Planning, Legacy Planning for Next Generation, Long-Term Care Partnership Insurance Program, Montana Medical Care Savings Accounts, PODs/TODs and Beneficiary Deeds, Power of Attorney, PowerPay, Property Ownership, Retirement Planning, Singles and Estate Planning, What Young Farm Ranch Couples Should Know About Estate Planning, Wills and Trusts,
2011	43	1,328	Beneficiary Deeds, Credit Savvy, Estate Planning, Financial Check-Up, Life Estates, Long-Term Care Partnership, Property Ownership, PODS & TODS, Provider Orders for Life-Sustaining Treatment, Trusts, Taxes, Wills
2010	70	1,933	Credit Smarts, Dying Without a Will, Estate Planning for Forestry Landowners, Estate Planning for Next Generation, Estate Planning for Ranchers, Estate Planning for Younger Parents, Estate Planning a Women's Perspective, Family Finances, Financial Potpourri, Federal Estate Tax & Gift Tax, Montana Medical Care Savings Accounts, Montana's End-of-Life Registry, Property Ownership, Property Titles, Power of Attorney, Rights of Terminally Ill Act, Small Steps to Health & Wealth, Trusts & Taxes, Wills

Year	Number of Classes	Number of Participants	Subjects
2009	49	1,280	Avoiding Probate, Accessing Financial Education Needs, Credit Smarts: Helping You Become Credit Savvy, Estate Planning, Federal Estate & Gift Tax, Get a Grip on Your Money, MSU Extension Financial Resources, Passing Your Farm to Next Generation, Property Ownership, PowerPay, Power of Attorney, Retirement Planning, Savings Tools & Techniques, Small Steps to Health & Wealth, Trusts, What Are Your Rights Over Your Remains, Who Gets Your Property When You Die, Wills
2008	67	2,036	American Indian Probate Reform Act (AIPRA), Beneficiary Deeds, Credit Savvy, Estate Planning, Financial Status of American Women, Financial Resources, Get a Grip on Your Money, Land Transfers, Legal & Financial Issues of Alzheimer's, 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
2006	65	1,202	Estate Planning, Property Ownership, Estate Planning for Families with Minor Children, Legal and Financial Aspects of Alzheimer's, Who Gets 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

Year	Number of Classes	Number of Participants	Subjects
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, Financial Calculators, 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
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

Year	Number of Classes	Number of Participants	Subjects
1999	45	1,072	Estate planning, finances, investments, financial decision-making for aging parents, tools and techniques for financial decision making, using the Web to make financial decisions, retirement planning, college finance issues
1998	83	2,278	Estate planning, finances, investments, financial decision-making for aging parents, tools and techniques for financial decision making, using the Web to make financial decisions
1997	56	1,160	Estate planning, finances, investments, financial decision-making for aging parents
1996*	9	159	Estate planning, finances, investments, financial decision-making for aging parents (May - December)
1995*	12	263	Estate planning, Medicaid, and long- term care (Between Semesters)
1994*	5	94	Estate planning, finances, decision-making with financial calculator (Summer, only)
1993*	6	202	Estate planning, finances, decision-making with financial calculator (Summer, only)
1992*	43	1,833	Retirement planning, estate planning, decision-making with financial calculator, investments, and home-based businesses (January - July)
1991	27	953	Retirement planning, estate planning, decision-making with financial calculator, investments, and home-based businesses
* Completing Ph.D. program at Iowa State University 1992-1996.			
1990	46	1,495	Marketing home-based businesses, computer financial decision-making, estate planning, financial decision-making for high school students, and establishing a financial identity
1989	36	868	Estate planning, financial decision-making via financial calculators, credit, retirement planning, home-based businesses, and computer financial decision-making
1988	40	1,511	Estate planning, retirement planning, home-based businesses, and computer financial decision-making

Year	Number of Classes	Number of Participants	Subjects
1987	82	1,938	Financial decision-making via financial calculators, estate planning, home-based businesses, and credit

In-service Education Presentations: (for MSU County Extension Faculty); Iowa Extension; Wyoming Extension, MSU Employees *In-Service was provided via the Adobe Acrobat System)

- Montana Extension Association of Family and Consumer Sciences, April 2021
- Montana Extension Association of Family and Consumer Sciences, April 2019.
- Montana Extension Association of Family and Consumer Sciences, April 2018.
- Montana Association of Family and Consumer Sciences, Miles City, April 2017.
- Family Economics Update, MSU Family Consumer Science Extension Agents, May 2017.
- Family Economics Update, MSU Family Consumer Science Extension Agents, May 2016.
- Montana Association of Family and Consumer Sciences, Havre, April 2016.
- Montana Association of Family and Consumer Sciences, Hamilton, April 2015.
- Family Economics Update, MSU Family Consumer Science Extension Agents, May 2013.
- America Saves Webinar, MSU Family Consumer Science Extension Agents, October 2013.
- Family Economics Program, New Workers Orientation MSU Extension Agents, December 2013.
- Family Economics Program Planning, MSU Family Consumer Science Extension Agents, May 2012.
- Creative Ways to Teach Estate Planning, MSU Family Consumer Science Extension Agents, September 2012.
- Family Economics Program Planning, MSU Family Consumer Science Extension Agents, December 2012.
- Provider Orders for Life-Sustaining Treatment (POLST), Montana Family Consumer Science Extension Agents & Health Care Professionals, May 2011.
- Provider Orders for Life-Sustaining Treatment (POLST), Montana Family Consumer Science Extension Agents & Health Care Professionals, November 2011 (Webinar).
- Family Economics Programs, New Extension Agent Orientation, January 2010.
- *Grab and Go Mini Programs, Family Economics Webinar Sessions, 8 locations, January 2010.
- Retirement Planning, Solid Finances, January 2010.
- Small Steps to Health & Wealth, MSU Wellness Webinar, 4 locations, January 2010.
- Retirement Planning, General Public Webinar, 10 locations, February 2010.
- Retirement Planning Considerations for Those 3-5 years from retirement, Solid Finances, February 2010.
- Evaluation Tools, Family Economics Webinar Sessions, 5 locations, March 2010.
- Property Ownership, Solid Finances, March 2010.
- Savings & Credit, Horizons Facilitators, Glendive, April 2010.
- Savings & Credit, Horizons Facilitators, Helena, April 2010.
- Development in Family Economics, April 2010.
- Savings & Credit, Horizon Facilitators, Horizons Webinar, 6 locations, May 2010.
- Dying Without a Will, Solid Finances, October 2010.
- Topics in Family Economics, New Workers Orientation, October 2010.
- Probate, Power of Attorney, Trusts, & Cremation, Solid Finances, November 2010.

- PowerPay, co-developer: Keri D. Hayes (MSU Publications Assistant), Family Economics Webinar Sessions, September 2009.
- Communicating About Estate Planning, co-developer: Keri D. Hayes (MSU Publications Assistant), FSA Webinar Sessions, October 2009.
- Controlling What Happens to Your Remains, co-developer: Keri D. Hayes (MSU Publications Assistant), Family Economics Webinar Sessions, October 2009.
- Wills and Trusts, co-developer: Keri D. Hayes (MSU Publications Assistant), Estate Planning Webinar Sessions, October 2009.
- Savings Tools & Techniques, co-developer: Keri D. Hayes (MSU Publications Assistant), Family Economics Webinar Sessions, November 2009.
- Estate Planning Tools, co-developer: Keri D. Hayes (MSU Publications Assistant), FSA Webinar Sessions, November 2009.
- Federal Estate & Gift Tax, co-developer: Keri D. Hayes (MSU Publications Assistant), Estate Planning Webinar Sessions, December 2009.
- 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. 17 participants. (1 hour).
- High School Financial Planning Program, September 2007. 30 participants. (2 hours).
- Small Steps to Health & Wealth, December 2007. 32 participants. (2 hours).
- 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 hours).
- Track'n Your Savings Goals. 2004 (2 hours).
- 4-H Financial Champions. 2003 (5 hours).
- Track'n Your Savings. 2003 (4 hours).
- Teaching Financial Education: How Can You Get Involved. 2003 (1hr).
- Montana Rights of Terminally Ill Act. 2003 (1.5 hours).
- Using a Financial Calculator to Teach Financial Concepts in the Classroom. 2003. (2 hours).
- 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).
- Money Management. 1999. (1 hour).
- Retirement Planning. 1999. (2 hours).
- Using the Web to Make Financial Decisions. 1998. (1.5 hour).
- Retirement Planning. 1998. 3 hours).
- Who Gets Grandma's Yellow Pie Plate. 1997. (3.5 hours).

- Balancing Work & Family. 1997. (30 minutes).
- Financial Management. 1997. (4 hours).
- Trends in Family Economics. 1997. (1.5 hours).
- Who Makes Wills and Bequests. 1996. 40 minutes).
- Family Finance. 1996. 30 minutes).
- Family Economics Programming. 1996. 1 hour).
- Financial Management. 1996. (2 hours).
- Talking with Aging Parents About Finances. 1992. 2 hours).
- High School Financial Planning Program, (with Ward and Lutt). 1991. (8 hours).
- Financial Planning for Retirement. 1991. (1 hour).
- Women's Financial Information Program, via telelecture. 1990. 3 hours). With six Extension Agents.
- Evaluation of Extension Educational Programs. 1990. 3 hours).
- Home Day Care Provider Program. 1989. 2 hours).
- Women's Financial Information Program, via telelecture. 1989. 3 hours).
- You, Your Finances and Your Computer, via telephone, (with Cowan). 1989. 2 hours).
- Retirement Planning. 1988. 8 hours).
- Using New Technology (Computers and Financial Calculators) to Aid Families with Financial Decision Making. 1987. 3 hours).
- Home-Based Businesses. 1986. 6 hours).
- Financial Management. 1985. 16 hours).
- Financial Stress. 1985. (2 hours).

GRANTS

- Alzheimer's Disease in Service training for National Extension Association of Family and Consumer Sciences (NEAFCS) members, with Jennifer Munter, \$3,365, September 2022.
- Alzheimer's Disease Storybook program with Jennifer Munter, Montana Geriatric Education Center, University of Montana, for development of Native American Storybook on Alzheimer's, \$3,410, November 2022.
- Alzheimer's and Agriculture, with Jennifer Munter, Montana Geriatric Education Center, University of Montana, \$2,000, November 2022.
- Alzheimer's Virtual Training, with Jennifer Munter, MSU Faculty Excellence award, \$4,645, November 2022
- State Bar of Montana, Managing Someone Else's Money: Help for Trustees Under a Revocable Living Trust in Montana Bulletin, \$4,955, November 2022.
- Alzheimer's storybook development with Jennifer Munter, for Native American children, \$5,000 MSU Outreach award.
- Alzheimer's storybook purchases with Jennifer Munter, AARP Montana, December 2022.
- Alzheimer's Disease Awareness –To offer training for childcare providers, nursing home activity directors, and librarians, Montana Geriatric Education Center, University of Montana, \$2,000, December 2021.
- Alzheimer's storybook purchases, AARP Montana, \$1,000, November 2021.
- Alzheimer's Disease Awareness for Children Storybook Series" –Educate parents and children about Dementia through age-appropriate story books, \$1,500, December 2020.
- Montana Credit Unions for Community Development and First Interstate Bank Foundation, Credit Smarts Slide Calculators, \$1,500. December 2019.

- Montana Geriatric Education Center, Purchase Storybooks about Alzheimer's, Reading Guides for Parents, \$1,200. October 2019
- MSU Engagement Grant (with Roubie Younkin-MSU Extension Valley County Extension Agent), Develop a mini-conference in Glasgow for caregivers and professionals to assist with the care of individuals with Alzheimer's and other forms of dementia, December 2018-present, \$5,000
- Mary O'Neill Mini Grant, Association for Financial Planning and Counseling Educators, Develop a Legal and Financial Packet for caregivers and others concerned about memory loss, November 2018-2019, \$2,500
- Montana Community Foundation; Funding for Estate Planning presentations in counties; 2016 - 2019; \$15,000
- Montana Credit Unions for Community Development, Montana Saves Scavenger Hunt; 2014; \$1,000
- First Interstate BancSystem Foundation, Montana Saves Scavenger Hunt; 2014; \$1,000
- Montana Consumer Protection Division-Office of Attorney General, Montana Saves Scavenger Hunt; 2014; \$1,000
- Montana Commissioner of Securities and Insurance, Montana Saves Scavenger Hunt; 2014; \$1,000
- Montana Society of Certified Public Accountants (MSCPA) Legacy Foundation, Montana Saves Scavenger Hunt; 2014; \$1,000
- Montana Bankers Association Education Endowment Fund of the Montana Community Foundation, Montana Saves Scavenger Hunt; 2014; \$1,000
- Montana 4-H Foundation, Montana Saves Scavenger Hunt; 2014; \$500
- Montana Credit Unions for Community Development and First Interstate BancSystem Foundation, Montana Saves Scavenger Hunt; December 3, 2013; \$3,100
- Consumer Federation of America, America Saves Program, Montana Saves Scavenger Hunt, December 2013; \$1,000
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2011; \$800
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2010; \$1,000
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2009; \$1,500
- Montana Credit Unions for Community Development, First Interstate BancSystem Foundation, 2008; \$2,000
- High School Financial Planning Program, National Endowment for Financial Education, 2007; \$2,000
- 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, 2006 – 2008; \$32,076
- 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, 1990-2000; \$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, 2004; \$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

National

- National Extension Association of Family and Consumer Sciences, 1977 – present
- National Association of Community Development 2005 – present
- National Association of 4-H Agents, January 1999 – present.
- National Coalition for Consumer Education, 1992 – 2003.
- Association for Financial Counseling and Planning Education, 1991 – present.
- American Association of Family and Consumer Sciences, 1974 – present.
- American Council on Consumer Interests (ACCI), 1974 – 2010.
- Phi Epsilon Omicron (Honorary Association), 1973 – 2010.
- Omicron Nu (Honorary Association), 1972 – 2010.
- Gerontology Society of America, 1994 –1998.
- American Society on Aging, 1994 – 1998.
- Epsilon Sigma Phi, By-Laws, Constitution and Handbook Committee, 1992 – 1994.

Regional

- Western Region Home Management Family Economics Educator's Association, 1985-2003.
- Southeastern Family Economics Educator's Association, 1990-1998.

State

- Montana Non-Profit Association 2019 to present.
- Business, Estates, Trust, Taxes, and Real Property Section, State Bar of Montana 2020 to present
- Montana Community Development Association 2005 to present.
- Montana Gerontology Society, 2007 – present.
- Montana Financial Education Coalition, 2003 – 2020.
- Montana Association of 4-H Agents, January 1999-present.
- Epsilon Sigma Phi (Honorary Association Alpha Chapter), 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. Board Member, 1984; 1987.

- Montana Cooperative Extension Association (MCEA), 1978-present. Health Insurance Committee Member, 1980.
- Montana Extension Association of Family and Consumer Sciences, 1978-present. Treasurer 2005. State Meeting Evaluation Form Designer, 1990. Alumni newsletter, 2011-present.
- Kansas Home Economics Association, 1974-1977. Consumer Education Poster Contest Coordinator, 1977. Family Economics Chairperson, 1976.

SERVICE

National

- National Extension Association of Family and Consumer Sciences Investment Committee, 2017 – 2018.
- Association for Financial Counseling and Planning Educators (AFCPE) Development Fund, Committee Member, 2013.
- Farm Transition Planning Website Advisory Committee Member, Dale Norquist, Project Director, University of Minnesota, 2008 – 2010.
- International Farm Transition Network Advisory Committee Member, John Baker, Project Director, Iowa State University, 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 – 2009.
- Investment Committee Member, National Extension Association for Family and Consumer Sciences, 2004 – 2008.
- Estate Planning Committee Member, RMA, Pre-Conference, November 2006.
- Talking with Aging Parents About Finances MontGuide accepted as Featured Resource on Financial Security for All-Community Practice Website, 2006.
- State Representative for High School Financial Planning Program, 1990 – present.
- Association for Financial Counseling and Planning Educators, Reviewer, 6 poster presentations, 2004 – 2005.
- Selection Committee, Association for Financial Counseling and Planning Educators Distinguished Fellow, 2003.
- External Reviewer, National Extension Association of Family & Consumer Sciences, 2003.
- Editorial Board, *Forum for Family and Consumer Sciences*, 1998 – present.
- Editorial Board, *Journal of Family and Economics Issues*, 1998 – present.
- State Representative, National Coalition for Consumer Education, 1992 – present.
- State Representative, High School Financial Planning Program, National Endowment for Financial Education, 1990 – present.
- State Representative, Women's Financial Information Program, American Association of Retired Persons, 1987 – 1999.
- Limited Resource Committee Member, USDA, 1990.
- Evaluation Research Committee Member, Women's Financial Information Program, American Association of Retired Persons, 1989; 1990.
- State Membership Representative, American Council on Consumer Interests, 1989 – 1999.

- Inservice Education, "Montana Women's Financial Information Program." American Association of Retired Persons, St. Louis, August 1989; Dallas, March 1990; Ann Arbor, August 1990; Washington, DC, October 1990, Park City, Utah, August 1991.
- Board of Directors, Federal Reserve Board of Minneapolis-Helena Branch,
- January 2013 – December 2018: Vice Chair 2014, 2016 Chair 2015; Chair 2017; Vice Chair 2018.

Regional

- Editor, Western Region Home Management Family Economics Educators Quarterly Newsletter, 1996 – 1998.
- Reviewer, Master's Thesis Research Award, Western Region Family Economics Home Management Educators, 1996.
- Reviewer, Reviewed Research Papers, Western Region Family Economics Home Management Educators Conference, 1991 – 1995.
- Reviewer, Refereed Research Papers, Western Region Family Economics Home Management Educators Conference, 1990.
- Planning Committee Member, Western Rural Development Center Small Business Conference, 1987; 1988.
- Planning Committee Member, ECOP-Sponsored Western Region Meeting, Family Resource Management and Family Life Specialists, 1986.

State-Montana

- Judge, Career Communications Contest, Montana 4-H program, July 2021.
- Judge, Career Communications Contest, Montana 4-H program, July 2019.
- Judge, Career Communications Contest, Montana 4-H Program, July 2018.
- Montana Alzheimer's Workgroup, June 2016 – present.
- Legal and Financial Committee of Statewide Alzheimer's Workgroup, September 2017 – present
- Montana Coalition for Provider Orders for Life-Sustaining Treatment-Committee Member, 2012 – 2016.
- Montana State Health Insurance Advisory (SHIP) Committee Member, 2014 – 2020
- Montana Financial Education Coalition, Board of Directors, 2003 – present
- Chairperson, Montana Financial Education Coalition Conference, Billings-MT, 2007.
- Attorney General, End-of-Life Registry Advisory Council, 2006 – 2011.
- Montana Extension Association of Family and Consumer Sciences (MEAFCS), Treasurer, 2010
- Montana Law Help State Advisory Committee, 2006 – 2008.
- Member, Montana Legal Service Website 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 provided at the Department of Justice; Attorney General; Consumer Protection Division website, 2006.
- Member, State Health Insurance Advisory Council, 2005.
- Member, Montana Legal Service Website Stakeholder Committee, State Bar of Montana. 2005.
- 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 Group, Founding member 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.

Montana State University Service

- Masters & Degree Committee Membership, 2021
 - Jennifer Munter, Health and Human Development
- Masters & Degree Committee Memberships, 2017
 - Kathleen McMahon, Health and Human Development
 - Whitney Salo, Health and Human Development
- Masters & Degree Committee Memberships, 2014
 - Karman Klundt, Health and Human Development
 - Nolore Pearce, Health and Human Development
 - Paul Stoffer, Health and Human Development
- Masters & Degree Committee Memberships, 2010 – present
 - Carrie Fabian, MS Family Financial Management Program
 - Rachel Hubatt, MS Family Financial Management Program
 - Russell Luchsinger, MS Family Financial Management Program
 - Brandon Nissen, MS Family Financial Management Program
- Masters & Degree Committee Memberships, 2008 – 2009:
 - Kaylene Drummer, Education, Doctorate Program
 - Richard Marshall Jones, Adult Education Program, Doctorate Program
- Member of Master Degree Graduate Committees, 2006
 - Bernadine Warwood, Health & Human Development Department
 - Margie Haines, Health & Human Development Department
- Graduate Representative-Doctorial Committee (Andrew Dahlberg), Summer 2012
- Shared and was present to answer questions about Montana Medical Care Savings Accounts during “Well Check” on the MSU Campus, November 2011
- Member, Academic Technology Advisory Council, 2007 – 2009
- Internship Students, 2006:
 - Mary Anne Anderson, Education
 - Hanna Meccage, Health & Human Development
- Graduate Representative Committee Member for two doctoral students, 2005
 - Kadence Drummer, Richard Jones
- Member, Health and Human Development, Family & Consumer Sciences Advisory Committee, 2004.
- Reviewer, promotional brochure for Health & Human Development Department, April 2004.
- MSU Extension, Program Planning Committee, October 2004.
- Reviewer, Tenure Dossiers, Health and Human Development, 2003 – 2004.
- Graduate Representative 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.
- Promotion and Tenure Committee Member, 2000.

- 2-Year Review Committee Member, Non-department faculty, 1992.
- Dean for Outreach (Extension/Continuing Education) Search Committee Member, 1991 – 1992.
- Advisory Board Member, MSU Home Economics & Consumer Sciences Unit, 1991 – 1993.
- Faculty Council Alternate 1984-1987. Member, 1987-1990. Re-elected, 1991. Alternate, 1998, 1999.
- MSU Presidential Search Executive Committee, 1990 – 1991.
- President's Outreach Study Committee Member, 1989 – 1990.
- University Budget Planning Committee Member, 1989 – 1990.
- Steering Committee, Faculty Council, 1987-1988; 1989 – 1990.
- University Promotion and Tenure Committee, 1988 – 1989.
- President's Budget Review Committee Member, 1987.
- Administrative Review Committee Member, 1986; 1987.
- Faculty Council Alternate, 1984-1987.
- Promotion and Tenure Review Committees (2) Member, 1987.
- Promotion and Tenure Review Committees (2) Member, 1985.
- Special Tenure Review Committee Member, 1985.

MSU College of Agriculture Service

- Promotion and Tenure Committee, 1990-1991; 1996 – 1998.
- Search Committee Member, Acting Associate Director, Resident Instruction, 1989.

MSU Department Service

- Department of Agricultural Economics and Economics Advisory Board, 2022 – 2023.
- Promotion and Tenure Review Committee Member, Department of Agricultural Economics and Economics, November 2016.
- Tenure Review for Teaching, Department of Agricultural Economics and Economics, February 2015.
- Search Committee Member-Vice Griffith Position, Department of Agricultural Economics & Economics, 2013.
- Search Committee Member, Agricultural Economics & Economics Department, 2011.
- Promotion and Tenure Review Committee, Department of Ag Econ and Econ, 2011.
- Search Committee Member, Agricultural Economics & Economics Department, 2009 – 2010.
- Member, Agricultural Economics and Economics Search Committee, 2008.
- Search Committee Member, Ag Econ & Econ Department, 2008.
- Member, Agricultural Economics and Economics Promotion and Tenure Committee, 2007.
- Member, Promotion and Tenure Committee, 2006.
- Supervised graduate student, 2006: Mary Anne Anderson
- Supervisor, Graduate Students, 2005 and 2006: Joel Schumacher, Tyler Wiltgen
- Supervise undergraduates for American Indian Probate Reform Act, 2005: Tony Little Owl, Tamara Birdsbill, Floyd Azure II
- Agricultural Economics and Economics Advisory Committee, 2002 – 2003.
- Advisory Committee Member, Elected, Agricultural Economics and Economics, September 1989 – September 1991; September 1996 to 1998; September 2000 – present.
- Search Committee Member, Agricultural Economics and Economics, seven positions, 1986; 1988; 1989; 1996; 1998. Secretarial Position, 1997, 1999
- Search Committee Member, Agricultural Economics and Economics, Department Head, 1991.

- Reviewer, Home-Based Businesses for Montana Consumer and Homemaking Programs, Department of Health and Human Development, June 1990.
- Health and Human Development, grant reviewer and presenter on Home-Based Businesses, 1989 – 1990.

MSU Extension

- Montana 4-H Foundation, Board of Directors 2021 to present
- Strategic Planning Committee, Activity Insights, 2020
- Search Committee Chair, MSU Extension Housing and Environmental Health Specialist, November 2014 – June 2015
- Missoula County Family and Consumer Science Agent Screening Committee Member, 2008.
- Staffed display at Extension Day on the Hill for Montana Legislative Session, 2005.
- Agricultural Marketing Search Committee Member, 2000.
- Promotion and Tenure Review Committee for Extension Faculty, Department of Political Science, College of Letters and Sciences, Search Committee, 2000.
- Agricultural Marketing Search Committee Member, 2000.
- Technology Transfer Funds Allocation Committee, 2000
- Evaluator, Public Speaking, Montana 4-H Congress, 1999.
- Strategic Planning Committee, 1998, 1999.
- Professional Development Week, 1992. Coordinated session on Promotion and Tenure Process.
- 4-H Congress Demonstration Judge, 1990.
- EDUFAIM Educator, Search Committee Member, 1996.
- Computer Applications Specialist Search Committee Member, 1987.
- Stillwater Extension Agent Search Committee Member, 1987.
- Marketing Committee Member, 1986 – 1988.
- Extension Professional Development Grants--Committee Member, 1988 – 1990.
- Day Care as a Business Development Committee Member, 1988 – 1989.
- Human Resources Research Committee Member, 1987.
- Conflict of Interest Committee Member, 1984 – 1985.
- Associate Director Search Committee Chairman, 1985.
- Farm Management Search Committee Member, 1985.
- Montana Extension Homemaker Finance Committee Advisor, 1985.

Community Service

- Loan Review Board Member, Capital Opportunities, Bozeman, 1989 – 1991.
- Board of Directors, Gallatin County Consumer Credit Counseling Service, 1985 – 1987.
- Financial Counselor (Volunteer), Gallatin County Consumer Credit Counseling Service, 1985 – 1987.
- Bozeman Community Education Instructor (Volunteer), Estate Planning, Financial Management, Financial Calculators, 1984 – 1989.

Other Service

- High School Financial Planning Poster Display at Montana Association of Family & Consumer Sciences Conference, Polson, MT. 2005

Collaboration with Organizations (Cooperated with in the development and review of Extension materials)

- Montana Alzheimer's Workgroup, 2015 – present.
- Montana Law Help, 2016 – present.
- Montana Attorney General's office (End-of-Life Registry), 2008 – present.
- Montana's State Auditor, Office of the Commissioner of Securities and Insurance, 2010 – present.
- Department of Public Health and Human Services, Senior and Long-Term Care Division, 2010 – present.
- Department of Public Health and Human Services (DPHHS); Office of Public Assistance, 2010 – present.
- Department of Public Health & Human Services, EMS and Trauma Section, 2010 – 2019.
- Montana Department of Justice, Office of Consumer Protection, 2010 – present.
- Montana Department of Revenue, 1998 – present.
- Montana Legal Services, 1993 – present.
- State Bar of Montana
 - Elderly Assistance Committee, 2010 – present.
 - Business, Estates, Trusts, Tax and Real Property Law Section, 1980 – present.
 - Health Care Law Section, 2010 – 2011; 2018 – present.
- Montana Board of Medical Examiners, 2010 – 2011.
- Montana State University, College of Nursing, 2010 – 2011.
- Association of Montana Health Care Providers, 2010 – 2011.
- Montana Nurses Association, 2010 – 2011.
- Community & Outreach Partnership Program, Risk Management Agency, 2008.
- Washington State University Western Center for Risk Management Education, 2008.
- Montana Credit Unions for Community Development, 2008.
- First Interstate BancSystem Foundation, 2008, 2019.
- Bureau of Indian Affairs Administrative Law Judges, 2007 – 2010.
- Indian Land Tenure Foundation, 2007 – 2010.
- Indian Land Working Group, 2007 – 2010.
- Washington State University Western Center for Risk Management Education, 2007 – 2010.
- Montana Securities Division, 1998 – present.
- Montana Department of Revenue, 1998 – present.
- Montana Legal Services, 1993, 1996, 1998, 1999.
- State Bar of Montana--Business, Estates, Trust Tax, and Real Property Law Section, Family Law Section, Women's Law Section, Elderly Assistance Committee. 1980 – present.
- Montana Society of Certified Public Accountants--Taxation Committee. 1980 – 1992; 1996 – present.
- Montana Society of Chartered Life Underwriters. 1980 – 1992; 1996 – present.
- Montana Credit Union Network. 1985, 1991 – 1992, 1997 – present.
- Montana Independent Bankers Association. 1983 – 1992, 1997, 1999.
- University of Montana--School of Law, Women's Caucus. 1990 – 1991, 1997 – 1999.
- Montana Department of Revenue--Inheritance Tax Section. 1980 – 1996, 1997 – 1999.
- Montana Department of Public Health and Human Services. 1992-1996, 1998 – present.
- Gallatin County Welfare Department, 1992 – 1994.
- Montana Attorney General's Office, 1992.
- Montana Commissioner of Life Insurance, 1992.
- Office of Attorney General--Montana. 1991 – 1992.

- Social and Rehabilitation Services--Child Enforcement Bureau. 1991, 1996 – 1999.
- Association of Family and Conciliation Courts--Montana Section. 1991.
- Judge's Research Group--Montana Judge's Association. 1991.
- Montana League of Savings Institutions. 1985, 1991-1992.
- Montana Department of Commerce--Small Business Advocate's Office. 1986.
- Internal Revenue Service--Estate Planning. Montana Section. 1980-1985.
- U.S. Department of Treasury--Savings Bond Section. 1984.

PROFESSIONAL DEVELOPMENT

Certification Hours

- Completed annually 30 hours Certified Financial Planning (CFP) (Requirement for Continued Licensing, 1985 – present).
- Completed 75 hours of Professional Development Units (Requirement to maintain Family and Consumer Certification) (3-year cycle), 2010 – present.

Conferences Attended

National

- Association for Financial Counseling and Planning Educators, (November 16, 2022 - November 19, 2022). Virtual.
- National Epsilon Sigma Phi meeting September 24 – 29, 2022, Branson, Missouri.
- Association for Financial Counseling and Planning Educators, (November 16, 2022- November 19, 2021). Virtual.
- Epsilon Sigma Phi, (October 26 – 28, 2019). Virtual.
- Association for Financial Counseling and Planning Educators, (November 16, 2020 - November 20, 2020). Virtual.
- AFCPE Annual Research & Training Symposium, Portland, OR., November 2019.
- Epsilon Sigma Phi Conference, Colorado Springs, CO, October 2019.
- AFCPE Annual Research & Training Symposium, Norfolk, VA, November 2018.
- AFCPE Annual Research & Training Symposium, San Diego, CA, November 2017.
- Montana Geriatric Workforce Enhancement Program: Moving forward what's Next for Dementia Care in Montana, October 31, 2017.
- National Extension Association of Family and Consumer Sciences, Annual Meeting, Big Sky, MT, September 2016.
- National Extension Association of Family and Consumer Sciences, Annual Meeting, White Sulphur Springs, WV, November 2015.
- Association for Financial Counseling and Planning Conference, Bellevue, WA., November 2014.
- AFCPE Annual Research & Training Symposium, Greenville South Carolina, November 20-22, 2013.
- Association for Financial Counseling and Planning Conference, St. Louis, MO., November 2012.
- Association for Financial Counseling and Planning Conference, Jacksonville, FL., November 2011.
- Association for Financial Counseling and Planning Educators, Denver, Co, November 2010.
- National Risk Management Conference, Reno, NV, March 2009.
- National Farm LASTS Conference, Denver, CO, June 2009.
- 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, November 2008.
- Estate Planning for Charities, Dome Mountain, May 2006.
- University of Arizona and MSU, Estate Planning Beyond Basics, Bozeman, June 2006.
- Legal & Financial Aspects of Alzheimer's, Denver, CO, October 2006.
- Indian Lands Working Group, Cabazon, CA, October 2006.
- High School Financial Planning Program (HSFPP), 1999.
- Federal Indian Probates and Estate Administration, San Diego, 1999.
- Indian Lands Working Group Symposium, Palm Springs CA, 1999.
- Indian Lands Working Group Symposium, Polson, Montana, 1998.
- Association of Financial Planning and Counseling, Ft. Lauderdale, Florida, 1998.
- Gerontology Society of America, Washington, DC, 1996.
- Gerontology Society of America, Los Angeles, 1995.
- Gerontology Society of America, Atlanta, 1994.
- High School Financial Planning Program, Denver, 1991-1994.
- Association of Financial Counseling and Planning Educators Conference, Kansas City, 1991.
- National Association of Extension 4-H Agents Conference, Phoenix, 1991.
- National Association of Extension Home Economists Conference, Tulsa, 1991.
- High School Financial Planning Program, Denver, 1991.
- Families in Transition: Structural Changes and Effects on Family Life, Cincinnati, 1989.
- Targeting New Horizons, American Home Economics Association Annual Meeting, Cincinnati, 1989.
- Women's Financial Information Program, American Association of Retired Persons, Washington, DC, 1988.
- National Family Economics Extension Specialists Workshop, Chicago, 1988.
- National Association of Extension Home Economists Conference, Louisville, 1987.
- ECOP Home-Based Businesses Conference, St. Louis, 1985.

State

- 70th Tax Institute University of Montana School of Law, Alexander Blewett III School of Law, Missoula, MT, (October 16, 2022 - October 18, 2022)
- 69th Tax Institute University of Montana School of Law, Alexander Blewett III School of Law, Missoula, MT, (October 15, 2021 - October 16, 2021) Virtual.
- Montana Geriatric Education Center, Dementia Care: What Matters, (October 16, 2021) Virtual.
- Epsilon Sigma Phi Annual Conference (October 26 – 28, 2021) Virtual.
- MSU Extension Annual Conference, MSU Extension, Bozeman, MT, (October 12, 2020 - October 14, 2020) Virtual.
- 68th Tax Institute University of Montana School of Law, Alexander Blewett III School of Law, Missoula, MT, (October 15, 2020 - October 17, 2020) Virtual.
- MSU Extension Annual Conference, MSU Extension, Bozeman, MT, (October 26, 2020 - October 29, 2020) Virtual.
- Learning to share scientific data, MSU Extension, Bozeman, MT, United States, (June 16, 2020). Virtual.
- Mental Health First Aid, Montana State University, October 2019.
- Civil Right Mandatory Training, Montana State University, February 2019.

- 65th Annual Tax Institute, University of Montana, October 2019.
- Webinar, Behavioral Interventions to Advance Self-Sufficiency, Division of Family and Consumer Science, NIFA, Bozeman, March 2018.
- Elder Justice, Consumer Protection Bureau (CFPB), Bozeman, April 2018.
- Catch New Ideas, Montana Association of Family and Consumer Sciences, Ennis, April 2018.
- Mental Health First Aid, National Council for Behavioral Health, Bozeman, May 2018.
- Linkage Between Early Childhood and Economic Development, Foundations for Prosperity Early Childhood in Montana, Bozeman, July 2018.
- Lessons from the Playground Empowering Bystanders to Intervene in Elder & Financial Abuse, American Society on Aging, Bozeman, August 2018.
- Exploring a New, Dementia Friendly Health Care Power of Attorney,” Gallatin Elder Law and Estate Planning, Bozeman, September 2018.
- Continuing Education Program “Aging Well in Montana”, Montana Geriatric Education Center, Missoula, October 2018.
- University Montana School of Law Tax Institute, Missoula, October 2018.
- MSU Extension Annual Conference, Bozeman, October 2018.
- Dementia in Gallatin Valley, Highgate Senior Living, Bozeman, November 2018.
- 65th Annual University of Montana Tax Institute, November 3-4, 2017.
- Getting What Matters, Montana Non-Profit Association, October 6, 2016.
- Montana Health Care Power of Attorney, State Bar of Montana, October 6, 2016.
- MSU Extension Annual Conference, October 14 – 16, 2016.
- 64th Annual University of Montana Tax Institute, October 25-27, 2016.
- Montana Gerontology Society Conference, April 13 – 15, 2016.
- MSU Extension Annual Conference, October 20-23, 2015
- 63rd Annual University of Montana Tax Institute, Missoula, October 23-24, 2015.
- 62nd Annual University of Montana Tax Institute, Missoula, October 17-18, 2014.
- MSU Extension Annual Conference, October 20-23, 2014.
- Montana Association for Family and Consumer Sciences, Big Sky, MT, 2014.
- 61st Annual University of Montana Tax Institute, Missoula, October 18-19, 2013.
- MSU Extension Annual Conference, October 22 – 24, 2013.
- Montana’s New Uniform Trust Code CLE Institute State Bar of Montana, Billings, November 8, 2013.
- Financial Literacy, Women’s Foundation of Montana, Chico Hot Springs, April 29, 2012.
- Graying in Montana, Wheeler Center, Helena, September 10-11, 2012.
- 60th Annual Tax Institute, University of Montana-School of Law, Missoula, October 26 – 27, 2012.
- MSU Extension Annual Conference, MSU-Bozeman, October 29 – 31, 2012.
- Discrimination and Harassment Training, Web-based, 2011.
- 59th Annual Tax Institute, University of Montana School of Law, Missoula, October 2011.
- Estate Administrative Procedures, National Business Institute, State Bar of Montana, Great Falls, March 2010.
- Elder Law, State Bar of Montana, Helena, March 2010.
- Montana Legal Issues, The Seminar Group, Billings, August 2010.
- 58th Annual Tax Institute, University of Montana School of Law, Missoula, October 2010.
- University of Montana, School of Law, Tax Institute, Missoula, MT, October 2009.
- 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.
- 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.
- 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.
- Principal Investigator Training, MSU Grants & Contracts office, November 2004.
- Opportunities for Estate Planning for CPA, 2001.
- 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.
- Web CT, MSU Campus, 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.
- The Purchase and Sale of Closely-Held Business: How to Plan, Draft and Negotiate the Best Deal for Your Client, Montana School of Law, Great Falls, 1999.
- Montana Association of Family and Consumer Sciences, Butte, 1999.
- Estate Planning Tax Update, State Bar of Montana, 1998.
- Elder Law Seminar, State Bar of Montana, 1998.
- Montana Association of Family and Consumer Sciences, Missoula, 1997, Billings, 1998.

- Solution-Based Financial Counseling, Helena, 1997.
- Estate Planning Under Tax Reform Act of 1997, State Bar of Montana, Polson, 1997.
- Tax for the General Practitioner, State Bar of Montana, Missoula, 1996.
- Indian Law and Estate Planning, State Bar of Montana, Helena, 1996.
- Elderly Law Seminar, State Bar of Montana, Helena, 1996.
- Trusts, Bozeman, 1996.
- Eudora E-mail, MSU Campus, 1996.
- Vincent Computer Interaction, Ames, Iowa, 1994.
- Evaluation of Extension Programming, Bozeman, 1992.
- Senior Series, Lewistown, 1992.
- Montana Home Economics Association Annual Conference, Billings, 1991.
- Improving Instructional Techniques with Adults, Montana State University, 1991.
- Financial Management Continuing Education Institute, State Bar, Bozeman, 1990.
- Human Capitol--MSU Extension, MSU, 1990.
- Revitalizing Rural America, MSU, 1990.
- Grant Writing, MSU, 1990.
- Day Care Business, Bozeman, 1989.
- Montana Home Economics Association Annual Meeting, Missoula, 1989.
- Lotus 123 computer training, Bozeman, 1989.
- Financial Ratios, Montana Bank, Bozeman, 1989.
- Small Business Seminar, Bozeman Chamber of Commerce, 1987.
- Starting a Small Business and Developing a Business Plan, Bozeman, 1985
- Instructional Methods and Media Workshop, MSU, 1985.